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ABSTRACT

Volume II of the Midterm Report for the Fort Lincoln New Town (FLNT) education system is devoted to staffing and administration. The descriptions of these components of the First Facility are extremely detailed. The "Open Plan" for the FLNT education system consists of seven separate plans, three of which are described in this volume: (1) Organization/Staffing Plan; (2) Operation Plan; and (3) Community Participation Plan. Though developed for the D.C. School in particular, the philosophy and basic components can be adopted to any setting that implements an Open Plan education system. (For related documents see ED 047 171 through ED 047 188.) (LS)

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GENERAL LEARNING CORPORATION
EDUCATIONAL SERVICES DIVISION

AA 000 669

GENERAL LEARNING CORPORATION
FORT LINCOLN NEW TOWN

MIDTERM REPORT
REVISED

NEGOTIATED SERVICES
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REPORT #3
VOLUME II

APRIL 6, 1970

FORT
LINCOLN
NEW
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FLNT

2

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2. ORGANIZATION/STAFFING PLAN

2.1 Organization Functions

It has been a common practice in schools to identify subsystems such as instruction and administration as almost totally separate and independent functions when in reality they are distinct but interdependent processes.

The Fort Lincoln School must be viewed as a system which is comprised of subsystems all functioning together to realize the education of the child on an individualized basis. In an individualized system involving highly flexible forms and processes of organization, all the elements must function together as an organic whole.

In the Fort Lincoln system, four distinct but interdependent functions are identified:

- Instruction -- conduct of the process to realize the primary goal of the system, the education of children.
- Planning and Evaluation -- review and modification of organizational goals in light of assessment of student, staff, and system performance and accountability to the public and clients.
- Development -- adaptation of the organization which results from the planning and evaluation function, and which fosters change in the areas of curriculum, staff, and organizational structures and procedures.
- Administration -- support of all other functions of the system by obtaining necessary resources and coordinating the application of those resources.

The central function is instruction, which is supported by the three other functions all related to each other -- planning and evaluation, development, and administration. These functions are conducted at varying levels in the organization -- at the system or school level or at the stage or substage level, depending on where decision making is most appropriately located.

2.1.1 Instruction

Instruction is conducted primarily at the stage level. A truly individualized program with students having a wide age span precludes a curriculum element being presented to all the students in the school in the same manner in a single time frame. Decisions regarding instruction must be made primarily within each stage, at the level closest to the affected students. The Education Plan has presented the broad set of activities that will be conducted within the instructional function.

2.1.2 Planning and Evaluation

Planning and evaluation serves a critical role in organization development and growth by providing the basis for modifying system and individual goals. It is the mechanism which identifies and measures appropriate indications of performance. An organization, whether an automobile manufacturer or a school system, can only modify its goals after it has examined where it is in relation to where it would like to be.

Planning and evaluation occur at all levels: overall system, school, stage, and individual student. At the system level it will also be the principal formal mechanism for local governance and accountability. Because the planning and evaluation function will be such an integral part of the information flow between school and community, community residents must be included in carrying out this function. Therefore, structuring organizational relationships and procedures for planning and evaluation requires involvement and decision making at various levels in the organization. At the system level, this function is probably best carried out in a task force approach in which all the resources necessary to complete the job effectively would be brought to bear. This task force could operate on an *ad hoc* basis, since the particular concerns to be addressed in the evaluation processes would vary over time. A detailed evaluation plan will be prepared as a part of the Comprehensive Plan.

2.1.3 Development

In response to indications received from the formal evaluation process and to regular feedback received from daily operation, the organization must be able to adapt to new ways of working, modify goals, and permit programs to evolve. The development function which permeates all aspects of the organization is necessary in order to keep the organization responsive and adaptive to changing needs. The design objective is to structure an organization which has people continually questioning the appropriateness of what is being done and the way in which it is done. This concern particularly affects two distinct areas in the operations of the organization: curriculum and staff.

In the conventional setting, curriculum development usually occurs in a rather formal manner by examining the internal structure of a given subject area and the methodology and materials used with that subject area. However, the "curriculum" in the Fort Lincoln School is a very broad concept which includes the environment (physical facility) and how it is used as well as the manner of structuring the individual experiences of children.

Curriculum development is continuously concerned with better ways of structuring educational programs or experiences. In the early months of the operation, curriculum development will occur continuously and will be concerned primarily with extending and strengthening the use of individualized instruction. The need for curriculum development will occur in the Fort Lincoln School because of new insights into how children learn, experiences with the system once it is operating, changing needs of society, and records of student performance after leaving the school.

Curriculum development needs are best identified by the people who administer the program on a daily basis -- the instructional staff. To realize this objective, it is imperative that teachers and other staff members accept the curriculum development function as part of their responsibility. Where curriculum development matters cross stages for some rather specific concerns, it may be useful to utilize the task force approach to some of the development tasks.

The overall objective of the staff development function is to select and maintain a proficient staff which is capable of executing responsibilities within a setting which provides strong job satisfaction. As the Fort Lincoln system begins to operate, continuing professional development will be emphasized. The management and coordination of staff development will be conducted on a school-wide level through a Staff Development Coordinator. However, most staff development will occur in the stage setting.

2.1.4 Administration

The administrative function will facilitate the work of others by having resources available as needed, coordinating other functions, specifying procedures for technical administrative tasks to be carried out on a decentralized basis, and performing those tasks which can be conducted best on a system or school level by a central official. Administrative functions include budgeting, purchasing, maintenance of physical facilities and learning environments, food services, staff and student scheduling, and student safety.

Three criteria will be used to determine that an administrative activity should be conducted at the stage level of the organization: instructional value, desirability of implementation at the operational level, and opportunity to reduce paper work and flow at a centralized level. Purchasing is a good example of an administrative task which easily lends itself to decentralization. Not only will teachers have discretionary funds from which to make purchases, but it is reasonable to expect that students may originate requests for and purchases of items out of teachers' funds (only within very specific guidelines, however). Allowing students to conduct some school operations with appropriate support has a developmental value because they are given the opportunity to understand a process which affects them. The objective is to let students acquire as much capability as possible in running the school. It is also recognized, however, that activities such as annual purchasing of bulk items can best be coordinated on a school level by a central official.

The person designated as Administrative Coordinator will have primary responsibility for administrative tasks. To facilitate the work of others, he will spend a good portion of his time with staff and students moving through stages to see that they have all that is necessary to execute their responsibilities. The Administrative Coordinator will be responsible for defining the procedures and for formal coordination of those procedures that are decentralized.

When the execution of administrative tasks produces undesirable consequences, such as interfering with a teacher's instructional activities, the procedures must be modified.

2.1.5 Summary

To further clarify and define the nature of these functions, Table 2-1 contains a set of sample activities associated with each function.

TABLE 2-1
ACTIVITIES CLASSIFICATION
(Sample Listing Only)

Systems	Instruction	Planning & Evaluation	Development	Administration
Function	Facilitate learning on the part of students by permitting interaction among student, teacher, and materials	Provide the means for modification of organizational activities in light of assessment of outcomes	Recruitment and selection of staff and provision of professional development activities Curriculum and Organizational Development	Support all other functions by providing human and material resources and by designing and executing technical procedures
	Selection, administration, and interpretation of test data Assessment of characteristics of students Measurement of achievement of objectives Prescription of methodology to achieve objectives Presentation of materials to students Production of instructional Materials Corrective intervention to direct behavior Communication with parents Assessment of personal development of student Communication with all staff members Modification of individual curriculum programs	Design and evaluation of research projects Assessment of allocation of financial resources Design of formal evaluation procedures for staff development Formal liaison with community and joint development of system evaluation for community participation process Goal evaluation and redirection Structure community evaluation of staff	Identification and recording of individual training needs Assessment of satisfaction of needs Attendance at preservice and in-service training Assistance towards others in evaluating training needs Identification of personal professional goals Evaluation of training programs Modification of individual curriculum programs Assessment of utility of particular curriculum materials	Record keeping Procurement of materials Provision for building maintenance Maintenance, storage, distribution of equipment Production of instructional materials Provision of building and personal security Utilization of community resources Serving as formal business link with D. C. schools Coordination of budget development Monitoring of accounting program

2.2 Organization Structure

The staff for the First Facility will be assigned responsibilities broadly within individual stages or on a school-wide basis. Staff relationships may be represented according to Figure 2-1.

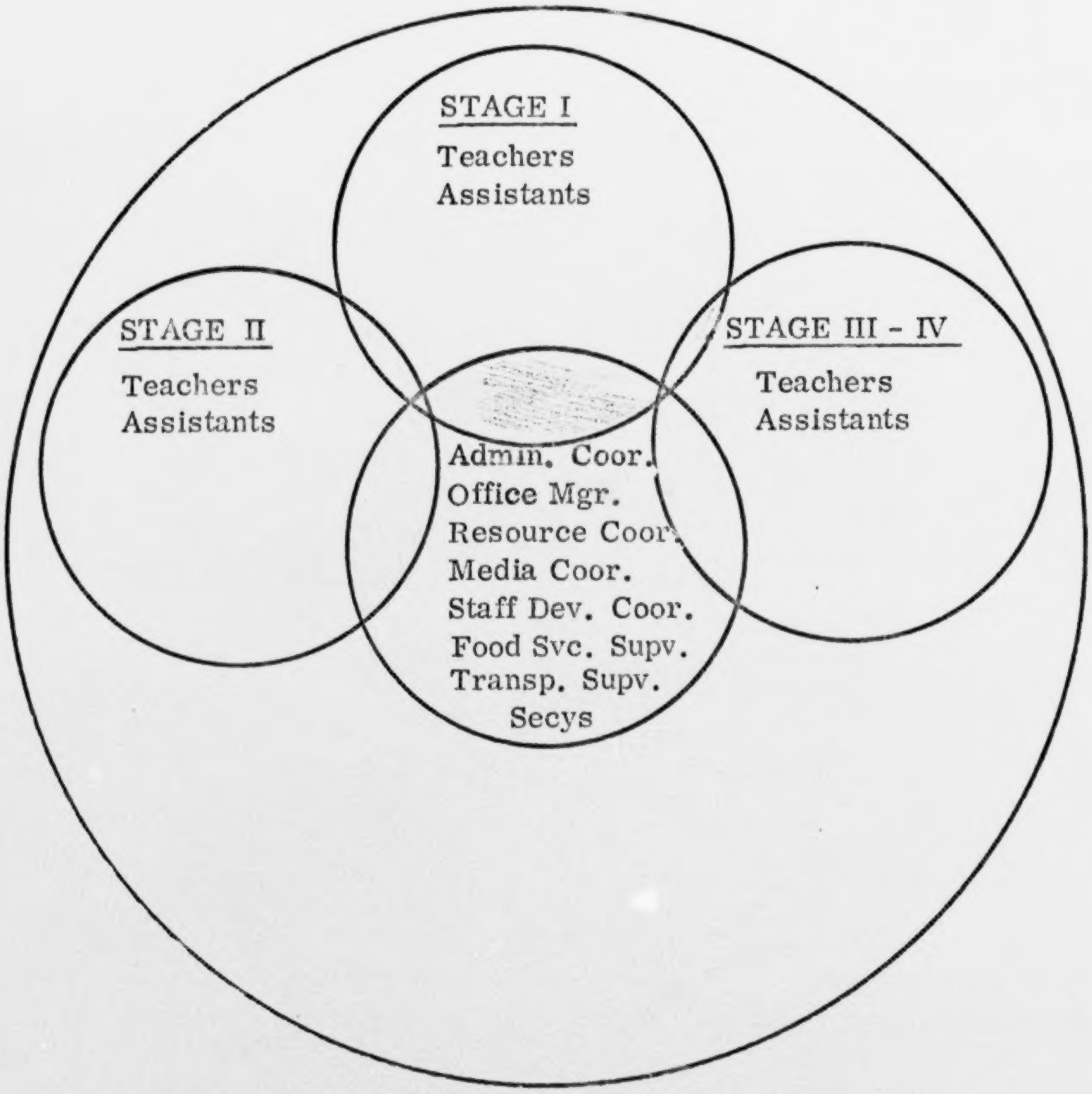

STAGE I
Teachers
Assistants
STAGE II
Teachers
Assistants
STAGE III - IV
Teachers
Assistants
Admin. Coor.
Office Mgr.
Resource Coor.
Media Coor.
Staff Dev. Coor.
Food Svc. Supv.
Transp. Supv.
Secys

Figure 2-1

The shaded areas signify the operational overlap that will occur at times among stages. The central administrative function will be conducted close to the actual instructional process and will overlap with stage operations.

2.2.1 The Team Concept

The principal mode of operation for the staff will be teams. Within a team, all members will share responsibility and accountability for the activities and success of the operation. The success of this arrangement is contingent upon the strength of peer relationships within the group, maintenance of positive self-perceived group standards, and the problem solving skills of team members. It is expected that in most cases these factors will lead to resolving group conflict and to team members assuming (or assigning) accountability for specific activities.

There are three principal team structures: the Instructional Team operating at the stage level, the Operating Team functioning at the school level, and the Administrative Team functioning in a support role. The Operating Team assumes shared responsibility for overall operations of the school (See Figures 2-2, 2-3, and 2-4 for illustration of team relationships.)

The Instructional Teams are the core of school activity and the primary decision-making groups. However, the Instructional Teams are subordinate to the Operating Team when the latter convenes to resolve conflicts or decide school-wide operational guidelines.

The Administrative Coordinator, the Staff Development Coordinator, the Resource Coordinator, and the Media Coordinator relating to each other and the stages in a staff capacity will serve the needs of the stages and structure their activities accordingly. This does not mean that they are subservient to the stages, but rather that they assist stage personnel in getting their job done effectively.

The support personnel are responsible to the Administrative Coordinator.

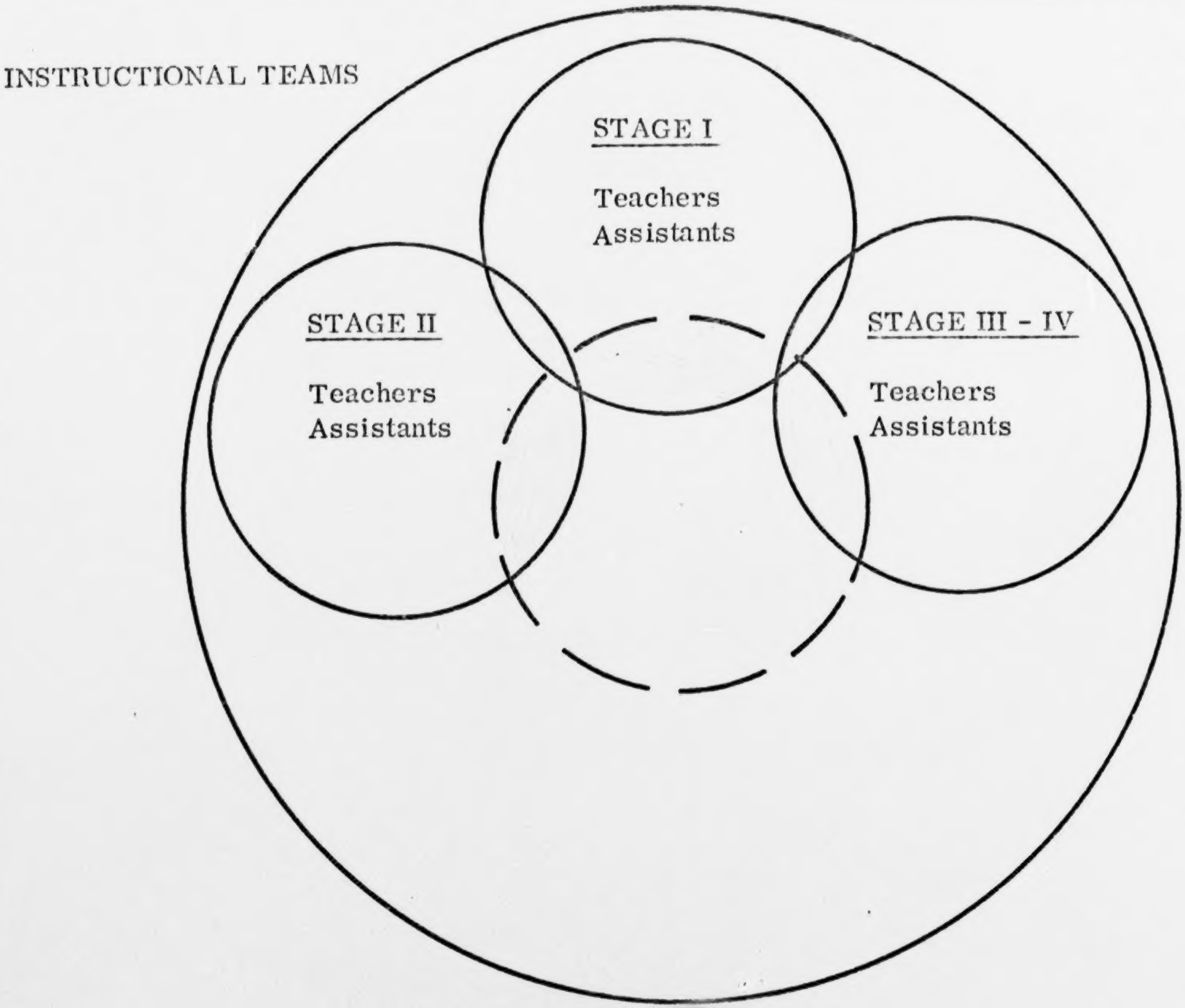

INSTRUCTIONAL TEAMS
STAGE I
Teachers
Assistants
STAGE II
Teachers
Assistants
STAGE III - IV
Teachers
Assistants

Figure 2-2

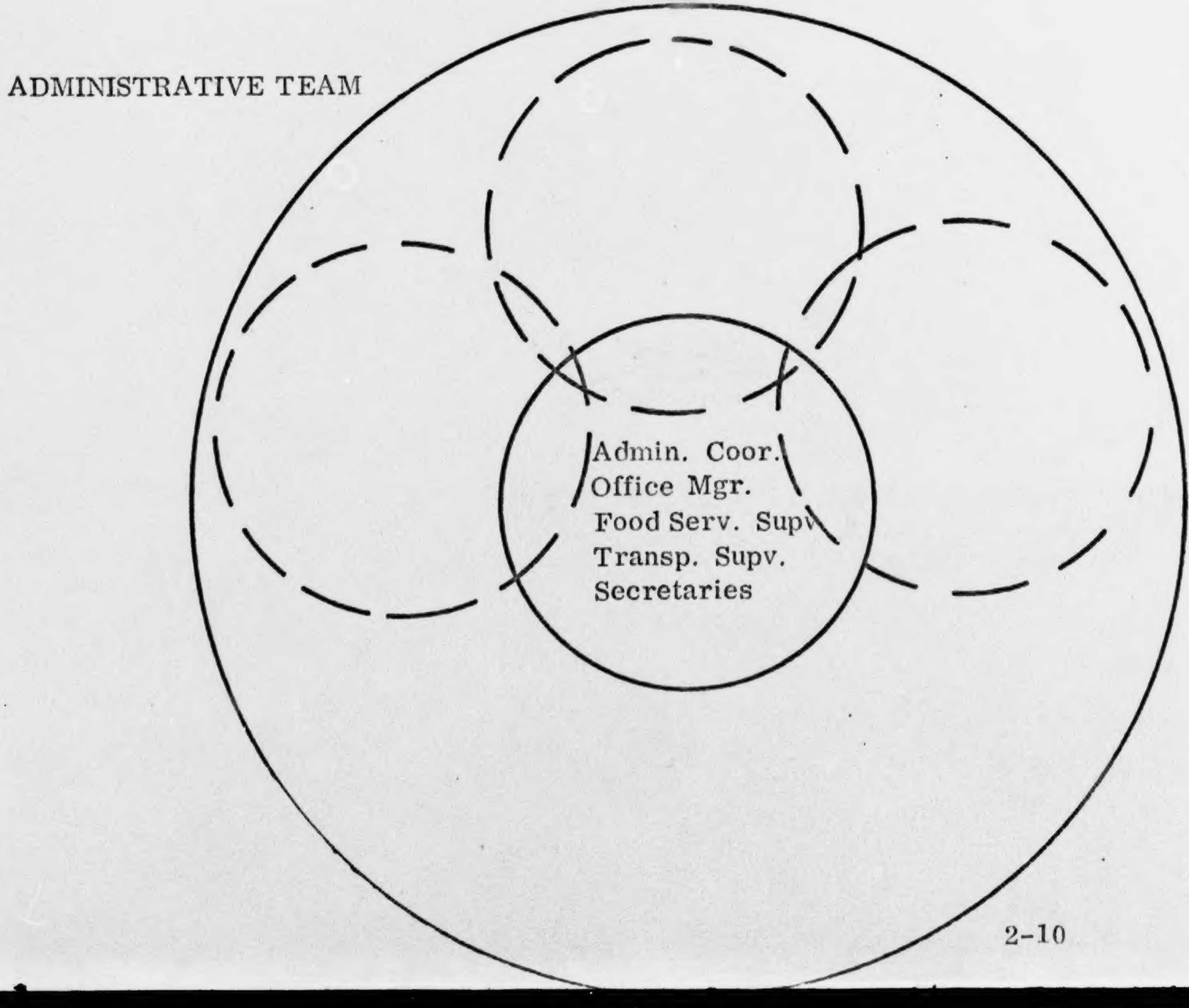
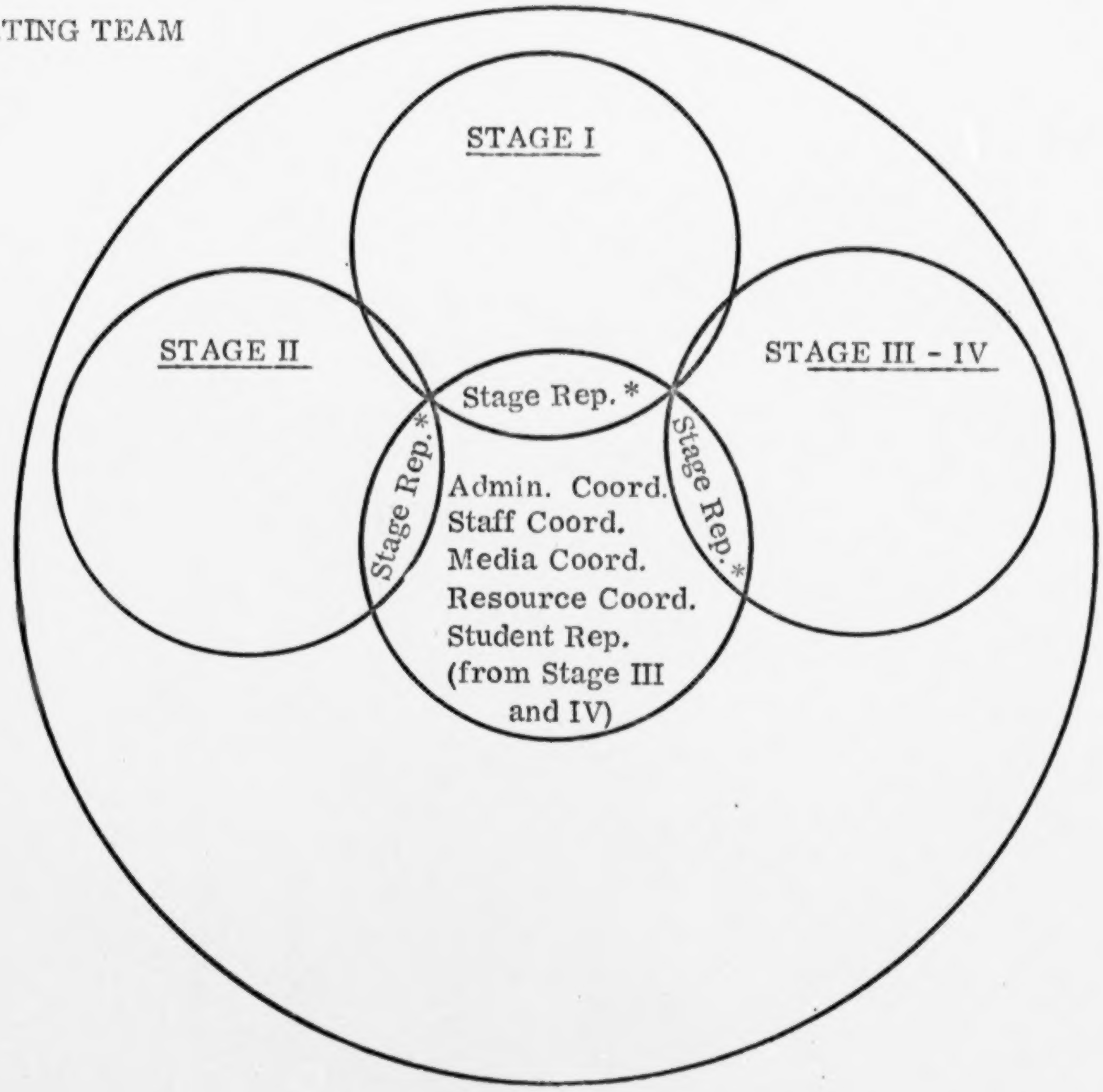

ADMINISTRATIVE TEAM
Admin. Coor.
Office Mgr.
Food Serv. Supv.
Transp. Supv.
Secretaries

Figure 2-3

OPERATING TEAM


STAGE I
STAGE II
STAGE III - IV
Stage Rep. *
Stage Rep. *
Stage Rep. *
Admin. Coord.
Staff Coord.
Media Coord.
Resource Coord.
Student Rep.
(from Stage III
and IV)

* Stage representative selected by instructional personnel in each stage to serve as official liaison with rest of school.

Figure 2-4

2.2.1.1 The Operating Team

The Operating Team is made up of the three Stage Representatives, the Administrative Coordinator, the Staff Development Coordinator, the Media Coordinator, the Resource Coordinator, and a student body representative. (The student representative should be selected from the highest stage by the Instructional Team and students.) This group will normally function in a problem-solving capacity and will address itself to spelling out operational guidelines for the school. While responsibility for school operation will be shared, it will be incumbent upon individual members of the Team, functioning in their regular jobs, to implement the operating procedures of the school. In this way, decision making and implementation will be decentralized through the Operating Team members and will occur close to the level of implementation.

Designing operating guidelines does not mean specifying how a job is to be done. Members of the Operating Team should refrain from making operational decisions in specific areas. For example, decisions concerning how the Staff Development Coordinator should do his job should rest with the Staff Development Coordinator and his clients in the stages. The role of the Operating Team will be to decide the kind of staff development that will be needed to make the school more efficient and to supply the information and assistance that the Staff Development Coordinator needs to provide staff training of the desired type and quality. Meantime, the Operating Team will be developing the operational guidelines which reflect the policies developed by the Fort Lincoln School governing board (See Community Participation Plan) and the D. C. Board of Education.

The largest role of the Operating Team will probably be to share information and resolve problems. The functions of this group should obviate the need for a principal in the usual sense of a day-to-day administrator of the school. No single individual could be expected to function successfully in such a role in an operation as complex and demanding as the Fort Lincoln School. The Fort Lincoln Project Director, who will have ultimate authority for the school, will be able to function as an executive working with the community and others at the Special Projects Division, leaving day-to-day operations to the Team.

In their operational role, members of the Team will have sufficient expertise, knowledge, and resources to reach the best decisions. Stage Representatives will be able to present the best thinking of their teams; the Administrative Coordinator will be able to provide alternative administrative procedures for consideration; and the Staff Development Coordinator will be able to provide assistance in improving the quality of the group's internal decision-making process.

In addition, the Team ought to be able to act to resolve organizational conflicts which cannot be managed at the stage level. For example, the Team might address a conflict occurring between two stages over the use of shared personnel which stage members cannot resolve.

Dissemination of the results of the Team effort to all school personnel will flow naturally from its membership. Stage Representatives will report to the stages, the Administrative Coordinator will report to administrators, etc. The interdependent relationships of the members in the operational, day-to-day activities of the school assure that any deviations from agreed upon plans will be corrected quickly.

The decentralization of decision making and the freedom of each staff member to do his job, together with the shared responsibility for success or failure that the Operating Team structure provides, are considered essential to the hoped-for climate of the school.

2.2.1.2 Instructional Team

Each of the three Instructional Teams, Stage I, Stage II and Stage III-IV, will be composed of the teachers and assistants assigned to the stage. Others such as student helpers, volunteers, and staff members not assigned to a stage will join the Instructional Team on a part-time basis, as the instructional needs of the children dictate.

The primary responsibility of the Instructional Team is to plan, implement, and evaluate an effective instructional program for each child in the stage. The leadership of the instructional function of the Team rests mainly with the Master Teacher in the stage. It will be his concern to establish and maintain instructional standards of highest quality and to identify, use, and develop the resources of each staff member assigned to the stage to the maximum benefit of the staff member and the students.

Examples of specific matters which will require the attention and action of the Instructional Team are:

- Assigning students to advisors for diagnosis and prescription
- Physical arranging of the stage (placement of activity areas, displays, and storage of materials)
- Planning and scheduling activities (testing, group instruction, projects, use of outside resources, parent conferences)

- Selecting materials
- Reviewing student progress
- Coordinating with other stages (assignment and evaluation of student helpers, use of special facilities such as the planetarium and gymnasium, procedures for transfer of students, requests for assistance of subject-matter specialists)
- Operating rules for students and adults (includes responsibility for replacing materials and checking out audiovisual equipment to be used independently)
- Planning and implementing purchase of new materials and equipment
- Identifying staff development needs for stage and school personnel
- Selecting stage representatives

2.2.1.3 Administrative Team

This Team will function on a school-wide basis to support the instructional process. The Administrative Coordinator, Office Manager, food services and transportation supervisors, and clerk typists will conduct and coordinate the "noninstructional" elements of the school's operations, vis;

Budgeting
Purchasing
Accounting
Personnel records and payroll
Attendance, registration, and scheduling
Building maintenance
Central student record keeping
Food services
Student safety, security, and supervision

The Administrative Coordinator and his staff will be concerned primarily with providing resources for the stages, and with designing and monitoring the procedures which can best support the instructional program. The other members of the Team will be primarily concerned with execution of the procedures. No member of the Administrative Team is to be precluded from participating in the instructional process. On the contrary, since every member of the staff is expected to make an educational contribution, the Office Manager may help students with their mathematics by teaching them to use the calculator or a secretary may work with students using the typewriters for reading activities.

2.2.2 Task Force Concept

When there is a need to accomplish a task on a nonrecurring or periodic basis, a task force may be assembled from the staff, students, and community to assume these duties. It would be assembled on a temporary basis drawing on the talents available and organizing to achieve its particular goals. There may be a number of tasks of this kind: curriculum development projects crossing all stages, a special staff development program, a need to change procedures, a research project, etc.

The task force approach is particularly appropriate for school-wide planning, budgeting, and evaluation which must be done on a cyclical basis each year. Using a task force approach can provide for broad participation in decision making and ensure, for example, that planned expenditures are closely related to needs at all levels.

It is expected that task forces can provide a flexible means of drawing on the resources of the staff and community as needed and make a significant contribution to achieving selected objectives of the school organization.

2.3 Organization Roles*

The unique structure of the Fort Lincoln Schools and the focus of the schools on the individual student instead of a classroom group require new roles and new relationships among staff. Each of the roles has been carefully structured to allow each staff member to make maximum use of his skills and knowledge. Organization relationships have been designed to promote complete flexibility in meeting student needs and to provide all staff members with the opportunity and the necessity for close mutual support and assistance. At the end of this section of the plan lists of duties and responsibilities which are part of specific staff roles are included.

2.3.1 Roles

2.3.1.1 Stage Representative

The Stage Representative is a member of the stage team selected by the team to represent it at the school level, contributing to educational leadership. As a member of the Operating Team, he will concern himself with those matters which are external to the stage.

While all members of the stage team will have an administrative role, the Stage Representative will have a larger responsibility in this area than the other members. He will be concerned with reports disseminated outside the stage and the school, data and information for the Office Manager, and similar administrative duties. The Administrative Coordinator is his chief resource person.

The Stage Representative is also the primary communication link between his stage and other stages. While all team members will be free to talk with all school personnel, the Stage Representative will be the person who will transmit team decisions, suggestions, and other information.

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* The proposed position descriptions and recommended classifications for the FLNT school which reflect these roles appear in a separate document.

Qualification for the position is selection by the team, and no selection procedure is specified. It is recommended that the Stage Representative be selected on an annual basis.

2.3.1.2 Teacher

In the Fort Lincoln School, the teacher will find some parts of his total role familiar; other parts may be unfamiliar. While he will engage in group instruction as needs of children demand, his major orientation will be toward the diagnosis of individual students' learning patterns and the prescription of appropriate materials and activities for each child. While he will instruct in various elementary school subject matters, he will have a specialty to use as a resource for students and other teachers. While he may relate in an instructional capacity at one time or another to all students in the stage, he will be an advisor, i.e., be responsible for the overall development of a certain number of students within the stage. In the Fort Lincoln School, communication with other teachers, optional in a traditional classroom setting, becomes essential for the teacher as a member of an instructional team sharing responsibility and authority for the services of the stage operations.

A large portion of his role as teacher will be to make optimum use of the skills and judgement of his team members in the instruction of the student for whom he is responsible, and to use his own skills and judgment with students for whom other teachers are responsible. While his role calls for him to actively assist and support all other members of the team, he must also solicit and accept assistance and support from them. The interdependent nature of the entire instructional process will place a premium on the teacher's ability to fill the role of team member.

Since a primary goal of the Fort Lincoln System is to decentralize administrative decision making to have it occur as close to the instructional process as possible, the teacher must also fill an administrative role: e.g., participate in budget planning, account for discretionary funds available to him for minor purchases, serve on student / staff committees for school operations.

The role of the teacher will also include responsibility for evaluating himself and his peers, and for defining and pursuing his professional development needs.

He is also a communicator with other stages, other school personnel, the community, and parents. He must discuss regularly what the team is doing, what the student is doing, and what his expectations are. The overall teacher role also includes the following roles:

- Master Teacher

  Though the Master Teacher is only one participating member of the stage team, his role calls for him to provide educational leadership within his stage. He should be the catalyst who helps to improve total communication and participation among the team members, but he is not expected to function as a final arbiter or boss.

  The Master Teacher will have mastery of at least two subject-matter areas and he will be experienced and knowledgeable about how teams function. Demonstrated ability to diagnose and prescribe, as well as to pass those skills on to other members of the stage, will place him in the role of the chief resource person for the stage in those crucial areas.

  His basic and most important role, the one that will occupy most of his time, is that of teacher of students as a member of a teaching team; he will be responsible for the monitoring of overall development of the greatest number of students, since he most likely has the greatest amount and range of experience. It is expected that any and all decisions that affect the team and the students will be joint decisions of the entire team. As the catalyst, the Master Teacher will be the key person in assuring that all appropriate persons are involved in decision making.

His supervisory role is minimal and almost nonexistent as far as staff is concerned. It is expected that evaluation of performance, identification of professional strengths, etc., will be group functions and will be done in the group setting. He will, however, serve as a major resource to the less experienced teachers, e.g., reviewing prescription of interns.

The title and position, "Master Teacher," refers to a professional level of competence rather than to an organizational or hierarchical role.

- Associate Teacher

The Associate Teacher has the same basic role described above for all teachers. The main differences are his level of experience and his level of skill in diagnosing, prescribing and presenting instruction, which are greater than an Intern Teacher but less than a Master Teacher. He will seek guidance and direction from the Master Teacher when diagnosing and prescribing for students with unique or difficult learning problems.

His expertise in at least one subject-matter area and his level of experience and demonstrated competence in diagnosing and prescribing will mean that he is a major stage and school resource person in transmitting his knowledge and skills to other teachers.

The role of Associate Teacher calls for him to make use of the talents of all team members as he increases his skill levels and as he plans his personal growth program.

Associate Teacher also refers to a level of competence rather than an organizational level.

- Teacher Intern

The Teacher Intern is a beginning teacher. He may be a recent graduate of a teacher training program or a person with a set of experience and skills needed for the instructional program. He is a teacher, and his role is that described above.

Among the stage team members, he will have responsibility for the least number of students, and he will receive the greatest amount of assistance in diagnosing and prescribing for students and in instructing.

The beginning teacher is not thrown into a "sink or swim" situation; he is provided with experienced teachers whose role it is to help him. His role is to understand what he should be learning to do, to make use of the entire team in learning to do it, to identify clearly his strengths and weaknesses, and to assume responsibility for his personal and professional growth.

The title "Intern Teacher" refers to a level of competence rather than to an organizational role.

- Teacher Extern

The Teacher Extern is a student in the junior or senior years of college who is interested in becoming a teacher and wants steady exposure to a school situation. A Teacher Extern will work under the close supervision of a Master Teacher or Associate Teacher in the instructional team carrying out assigned duties and responsibilities which serve the instructional process as well as his development and orientation as a teacher.

The term "Teacher Extern" refers to a level of competence rather than to an organizational role.

2.3.1.3 Assistant

The Assistant is the paraprofessional member of the Instructional Team and has one of two major roles depending on his assignment as Stage Assistant or School Assistant.

The Stage Assistant will maintain student records, administer tests and record results, maintain records of equipment and material assigned to the stage, etc. He also will work with students individually and in groups to present prescribed instruction. He is a full member of the stage team and participates in stage decision making.

The School Assistant may work anywhere in the school. He is not prohibited from assisting in the stages, but his title indicates that his primary duties are outside the stage context. He may supervise children on the playground, on trips away from the school, or in the media center. He may work in the school office or for any one of the Coordinators. No matter where he works or for whom, his purpose is to support instruction.

2.3.1.4 Coordinators

Several roles essential to the successful implementation of the Fort Lincoln School must be performed by necessity across all stages. These roles have coordinative functions which serve the instructional process. In addition to each of the specifications in the following role descriptions, the Coordinators will devote a portion of their time to instruction within the stages.

- Administrative Coordinator

  The Administrative Coordinator has one of the most difficult positions in the school. While he must concern himself with such matters as food service, transportation, custodial service, and D.C. accounting requirements, his basic role is to support the stage teams. He has to be able to view his job as that of expediting the paperwork of, and for, the stages.

  A key portion of his role is his participation on the Operating Team, concerned with school leadership. He is the principal resource person of the group on matters concerning the use of administrative procedures to accomplish the goals of the school.

  In the Fort Lincoln School, many of the administrative records normally maintained in a central office will be maintained in the stages. Therefore, the bulk of the work and time of the Administrative Coordinator will be in the stages. He must be able to allocate his energies among the three stages and his school level responsibilities.

He also has a supervisory or managerial role since the food service staff, custodial staff, transportation staff, and the office staff will report to him.

- Staff Development Coordinator

The role of the Staff Development Coordinator has a large "technical" component. He assists the school staff in defining its training needs, helps to organize and conduct internal training programs in response to those needs, and he is the chief resource person in methods of evaluating training efforts.

Another major portion of his role is to serve as a group process resource. In this role, the Staff Development Coordinator will work with the stage teams to improve the quality of staff interaction, and he will be the school level resource person in efforts to improve the quality of group decision-making processes. He will be expected to identify and use outside consultants and resources as necessary. As a member of the Operating Team, he is part of school leadership.

The third major part of his role is his responsibility for personnel. He will maintain close liaison with teacher training programs and other sources of potential teachers and training assistance. He is the principal resource person for school policy and decision-making groups identifying desired qualifications of applicants and establishing selection procedures.

The Staff Development Coordinator is expected to be a personal resource to all school staff members in their individual efforts to improve their interpersonal skills and competence as effective group members.

- Resource Coordinator

The Resource Coordinator has two basic roles. One is internal to the school, the other is external. Within the school, the Resource Coordinator works in the stages with the Instructional Teams. He assists them by identifying possible resources for instruction in the community and in the greater metropolitan area. In this role, he must be aware of the educational objectives of the teams and spend a large portion of his time in the stages. He will act as primary liaison with the I. E. C. (See Community Participation Plan) and the Budget Committee (See Operations Plan). He will be expected to maintain advance schedules of activities taking place throughout the metropolitan area, and to disseminate them to all stage teams. Events at the Smithsonian, government activities, etc., all may be considered by stage teams as educational experiences for students.

At the school level, the Resource Coordinator is a member of the Operating Team and is part of school leadership. He is responsible for providing assistance to the Operating Team in decisions regarding the allocation of area and community resources among the stages.

In the external portion of his role, he is responsible for maintaining close liaison with social agencies and with departments or offices of the D. C. School System that can supply services to the Fort Lincoln School. He will also work closely with community organizations and groups in his attempt to involve them in the operations of the school and to involve students in service capacities in the community.

In both his internal and external roles, the Resource Coordinator functions as a service to the stages and as a support to the instructional process.

- Media Coordinator

The Media Coordinator is a combination librarian, artist, and technician. He has basic responsibility for operating the resource center, but the center differs greatly from the traditional concept of either a library or an audiovisual center. The facilities and materials in the center will be much more accessible to students and teachers than is usual practice.

The Media Coordinator will need librarian skills and training to perform the technical tasks of locating, ordering, logging, and cataloguing books, periodicals, film, filmstrips, etc. He should have knowledge of computer language and computer applications in Library Science. He will need technical skills to troubleshoot and maintain equipment such as tape recorders, Language Masters, controlled readers, projectors, etc. He will need artistic skills to produce the graphic materials required by the stages.*

The Media Coordinator will also have a role as a teacher -- for staff as well as students. It is anticipated that he will transmit his skills in each of these areas to staff and students to the extent possible, and that he will function as a media consultant to the school staff.

2.3.1.5 Office Manager

The Office Manager handles the routine procedures of processing purchase orders, answering the telephone, maintaining accounting and business records that are not kept in the stages, and collecting and/or summarizing data and information for reports to the D. C. School System.

He also has a supervisory role through his management of the clerical support staff in the office.

The Office Manager will be the initial contact for requests for information, for visitors to the school, and for all incoming mail not personally addressed, and he will have to view himself as having a public relations and communication role. It will be his responsibility to see that routine notices are received and distributed, requests for information are forwarded to the proper person, and that all visitors and callers are courteously received and handled.

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* Should the recruitment of one person having the combination of these skills prove difficult, it might be advisable to hire a media assistant having either the artistic or audiovisual technical skills.

While his signature may be required in a number of instances, for example on purchase orders, he does not have approval responsibility nor does his role call for him to question the purpose or value of items purchased. Required signatures are to be affixed as a matter of course.

2.3.1.6 The Role of the Volunteer

A key concept of the Fort Lincoln School is to make the fullest use possible of community resources in the instructional process, and thus in effect to break down the typical isolation of most schools from the "life around them," for which their students are being prepared. The resources of even the poorest community are rich in the sense that they include human beings having talents, interests, and experiences of value to children. Not even the richest community, however, has the financial resources to pay salaries and stipends to all of the human resources that could be brought to bear on the learning program. Since a "spirit of volunteerism" is to be found in any community, demonstrated by people who are willing and enthusiastic about contributing their time and services for a worthwhile activity, the Fort Lincoln School hopes to attract a wide pool of volunteer resources either on a regular or intermittent basis. The role of the volunteer must be consonant with the overall instructional role of the regular staff. Under the direction or coordination of regular staff members, volunteers -- depending on their background, education, education, experience, talent, hobbies, etc. -- can carry out specified tasks such as the following:

- The scoring of pre- and posttests
- Tutoring of children needing special help or attention
- Accompanying students on independent field trips

- Assisting the media coordinator by cataloguing books, producing graphics, etc.
- Organizing special activities such as book fairs, holiday observations,or celebrations
- Supervising a hobby club such as photography, stamp collecting, modern dance, etc.
- Delivering special presentations to groups of students on a particular unit of study (a postman, a computer analyst, a space program worker, a weaver, a gardener, an architect, etc.)
- Accompanying visitors on a guided tour of the school, or preparing special brochures or program material in response to requests for information about the school.

The Resource Coordinator will coordinate the volunteer program — recruitment, maintenance of files regarding background, scheduling, etc. He could very well be assisted in this responsibility by volunteers themselves as well as regular stage team members with whom the volunteers will work.

2.3.2 Role Dimensions

There are three dimensions to each role in the Fort Lincoln School: leadership, resource, and support.

- The leadership dimension of a role is defined as that which provides impetus to others to carry out tasks and which contributes most to effective use of others in defining problems and developing effective and creative solutions.

- The resource dimension of a role is defined as that which contributes to the instructional program in the form of specialized skills or knowledge not widely distributed among the staff.
- The support dimension of a role is defined as that which calls for assistance to others in their roles.

Each role in the Fort Lincoln School has all three dimensions. For example, a Stage Assistant may fill a leadership function at some point in the work of the stage team. However, while each role and person will be expected at appropriate times to work in the most functional manner, the principal dimensions of each role can be identified.

- Leadership

  Those roles which have a significant leadership dimension are Master Teacher, Stage Representative, Administrative Coordinator, Resource Coordinator, and Staff Development Coordinator.
- Resource

  Those roles which have a significant resource dimension are Master Teacher, Senior Teacher, Staff Development Coordinator, Resource Coordinator, and Media Coordinator.
- Support

  Those roles which have a significant support dimension are Administrative Coordinator, Staff Development Coordinator, Resource Coordinator, Office Manager, Media Coordinator, Stage Assistant, and School Assistant.

None of the above should be viewed as excluding any role from one or more of the dimensions. A School Assistant may possess certain skills or knowledge which the stages can use as a resource. While the most significant dimension of the role of the School Assistant is support, and it is so listed, it is expected that he will be a resource person when needed.

2.3.3 Fort Lincoln New Town Educational Project Director

At the inception of the planning for the Fort Lincoln New Town Educational System, the D. C. School System created a position for an Educational Project Director responsible to the Superintendent through the Special Projects Division. It has been the duty of the Project Director to relate to community groups and citizens and to furnish educational expertise in the planning and implementing of the Fort Lincoln education system. His continuing function has been to interact with the participants involved in the project — the D. C. School System, other District agencies, Architect/Engineer, and consultants involved in the educational development of the project. His duties include administration, development of educational programs, innovation in educational programs, and assistance in the recruitment of suitable personnel.

Throughout the preparation period for the implementation of the Fort Lincoln educational system, the Project Director will manage and supervise all activities leading to the operation of the school. While the Project Director will not have a day-to-day operational responsibility in the organizational framework of the First Facility, he will retain an overall supervisory position in relationship to the program whereby he is directly responsible and accountable to the Superintendent and the Board of Education for the continued development and evaluation of all programs as they evolve.

The Educational Project Director actually serves as the link between the D. C. School System and the entire Fort Lincoln operation, exercising his authority and responsibility in a manner faithful to the basic features of the organizational plan recommended: decentralization of administrative and decision-making processes; team governance; task force approaches to problem solving; student participation in decisions regarding system operation; community involvement in all aspects of operations. His role should essentially be that of a facilitator of the goals of the Fort Lincoln system. As such, he will be an arbiter in situations of conflict within Fort Lincoln or in the relationship of Fort Lincoln to the overall D. C. School System.

2.3.4 Activities and Responsibilities of Fort Lincoln Staff

In an effort to provide as detailed a picture as possible of the job responsibilities at the Fort Lincoln School, General Learning Corporation submits the following lists of activities which would be peculiar to each of the major positions on the staff. The activities are categorized as they relate to students, other staff members, parents and community, and to the system. The teacher activities are keyed to indicate activities performed by Master Teacher (M), Associate Teacher (T), and Intern Teacher (I).

ACTIVITIES AND RESPONSIBILITIES OF TEACHERS AT THE FORT LINCOLN SCHOOL

In Relationship to Students

I	Selects instructional objectives for students.
M, A	Selects, writes, or edits instructional objectives for students.
M, A, I	Administers and scores placement tests to locate students within curricular areas.
M, A	Administers, scores, and interprets placement tests to locate students within curricular areas.
M, A, I	Administers and scores pre-tests, post-tests, and comprehensive diagnostic tests for prescription and evaluation of student performance.
M, A	Given instructional objectives, writes criterion test items.
M, A, I	Prescribes appropriate curriculum materials and learning activities for achievement of instructional objectives.
M, A, I	Diagnoses student progress based on testing, observation, parent and student interviews,and consultation with other teachers.
M, A	Evaluates and modifies prescriptions on basis of student performance.
M, A, I	Using videotape or checklists, observes and records student behavior or activity.
M, A	Using expertise in specialty areas, recommends remedial, alternative, or enrichment learning activities.
M, A, I	Demonstrates competence to handle individual, small group, and large group instruction, by altering methods according to the situation, and utilizing available resources.
M, A	Plans activities which incorporate instructional objectives from a variety of disciplines (e.g., printing a class newspaper includes objectives from reading, communication skills).
M, A	Coordinates separate activities which exhibit instructional interdependence (e.g., coordinates a unit in science on animal adaptation with unit in social studies on man and his environment).
M, A, I	Arranges for and encourages use of off-site resources for groups and individuals on a regular basis.
M, A	Recognizes special learning needs and refers students to sources of special help.
M, A, I	Under advice of specialist, carries out special learning activities with children having special needs.

M, A, I	Consults with students regularly, listening to their ideas, exploring their interests, and motivating them to venture into new learning areas.
M, A, I	Engages in instructional activities with all children in the stage; assumes responsibility for long-range diagnosis, prescription, and evaluation of a specific group of children.
M, A, I	Reinforces desirable behaviors in students and demonstrates the use of a variety of reinforcement techniques.
M, A, I	Collects, records, and maintains records of student achievement, learning characteristics, social behavior, etc.
M, A	Collects, records, maintains, and interprets records of student achievement, learning characteristics, social behavior, etc.
M, A, I	Selects and adapts appropriate environment for learning activities through maximal use of flexible features of physical setting of the school.
M, A, I	Converts appropriate materials into multimedia presentations for enhancement of learning activities (makes transparencies, filmstrips, charts, games, etc.)

In Relationship to Other Staff Members

M, A, I	Offers assistance to and accepts assistance from other members of instructional team.
M, A, I	In writing diagnoses or prescriptions, solicits information from other teachers about their experiences with the student.
M, A, I	Coordinates scheduling of learning activities for students to ensureadequate access to space, equipment, and learning materials required.
M, A	Applies expertise in specialty area by acting as resource to other teachers in the school.
M, A	Keeps abreast of, reviews,and disseminates information on new curriculum in specialty area through reading, viewing, demonstrating, and experimenting with materials.
M, A	In specialty area, matches new curriculum materials to instructional objectives.
M, A, I	Plans and specifies instructional and clerical activities for assistants, student helpers, volunteers,and parents.
M, A, I	Contributes to team effectiveness by fulfilling responsibilities to be punctual, to accept routine housekeeping duties, to accomplish assigned or assumed tasks.
M, A, I	Upon request, participates in evaluation of peer performance.

M, A, I	Orients new staff members to procedures of the stage.
M, A	Actively participates in in-service training by presenting information or techniques in specialty area to other members of the staff.

In Relationship to Parents and Community

M, A, I	Initiates parent conferences to discuss progress of child and plan learning activities; responds with minimal delay to parent requests for conferences.
M, A, I	Provides parents with full explanation and interpretation of records of student performance during parent conferences.
M, A, I	Instructs parents in use of educational materials for work at home with students.
M, A, I	Articulates the philosophy and practices of the Fort Lincoln School to visitors and interested groups.
M, A, I	Regularly attends community/school meetings.
M, A, I	Solicits evaluative feedback from parents and community regarding teaching performance.

In Relationship to System

M, A, I	Makes use of available resources for self-evaluation (students, peers, parents, videotape).
M, A, I	Identifies areas for personal improvement and takes steps toward professional development.
M, A, I	Maintains and updates personal folder on professional development.
M, A, I	Cooperates in recruitment of prospective colleagues.
M, A, I	Participates in special groups or task forces to plan or evaluate system operations.
M, A, I	Utilizes organizational structure to resolve problems.
M, A, I	Maintains ledger of expenses for discretionary and control funds.
M, A, I	Correctly completes forms and vouchers for ordering and purchasing.
M, A, I	Supervises student participation in stage-level purchasing.
M, A, I	Executes procedures to ensure student safety and security.

M, A, I	Follows procedures for securing transportation services for field trips and for ensuring student safety on transportation vehicles.
M, A, I	Maintains physical inventory and security of goods and materials.
M, A	Participates in budgeting process, vis., program evaluation, program planning for identification of resources and required financial support; prepares appropriate budget requests reflecting evaluation and planning efforts.

ACTIVITIES AND RESPONSIBILITIES OF ASSISTANTS AT THE FORT LINCOLN SCHOOL.

In Relationship to Students

Administers and scores tests.

Records test scores in student folders.

Assists students in locating self-instructional materials.

Assists students in working with self-instructional materials (explains directions, answers questions, etc.)

Sets up, tests, operates, and puts away audiovisual equipment (projectors, tape recorders, etc.)

Prepares instructional materials — flash cards, charts, transparencies.

Reads and tells stories to young children.

Assists children in playing academic games.

Prepares learning environments (sets up science experiments, prepares clay, paints, etc.)

Assists the teacher in special classroom demonstrations.

Works with individuals or small groups of children in instructional activities prescribed by the teacher, listens to children read, conducts drills, supervises art activities.

Escorts young children to toilets, snack areas, resource center, health room, etc.

Accompanies students on field trips.

Demonstrates techniques of games and sports when necessary or requested.

Observes and reports on student behavior as it relates to interests, ability, social skills, and manual dexterity.

Assists in diagnosis of abilities and disabilities of exceptional children.

Assists in implementation of prescriptions for exceptional students.

Reinforces desirable behaviors in students and demonstrates the use of a variety of reinforcement techniques.

When working with children having special problems (physical, emotional, educational, social), performs in a manner consistent with management plan developed by stage team.

In Relationship To Other Staff Members

Shares in a mutual exchange of help and support among all members of instructional team.

Contributes to team effectiveness by being punctual, accepting routine housekeeping duties, and accomplishing assigned or assumed tasks.

Upon request, participates in evaluation of peer performance.

Orients new staff members to procedures of the stage.

Participates in planning sessions by introducing subjects for discussion or review, offering suggestions, volunteering to gather information or draft new procedures.

In Relationship to Parents and Community

Instructs parents in use of equipment available for work at home with students.

Explains the Fort Lincoln School to visitors and interested groups.

Regularly attends community/school meetings.

Solicits evaluative feedback from parents and community regarding performance.

As a resident of the Fort Lincoln community, shares information about composition, concerns, and needs of the community at staff meetings; interprets practices of the school in informal situations in the community.

Identifies community resources (people with particular skills or experiences, places, unique events) that would be useful in the instructional program.

In Relationship to System

Makes use of available resources for self-evaluation (students, peers, parents, videotape).

Identifies areas for personal improvement and takes steps toward professional development.

Maintains and updates personal folder on professional development.

Cooperates in recruitment of prospective colleagues.

Participates in special groups or task forces to plan or evaluate system operations.

Utilizes organizational structure to resolve problems.

Maintains stage attendance records and prepares required attendance reports.

Maintains inventory of self-instructional materials and equipment.

Orders new supplies of work-sheets, tests, etc.

Reviews purchase orders and vouchers of teachers and students.

Collects all data regarding stage level accounting and submits data to Administrative Coordinator.

Executes procedures to ensure student safety and security.

ACTIVITIES AND RESPONSIBILITIES OF ADMINISTRATIVE COORDINATOR

In Relationship to Students

Devotes a percentage of his time to instructional activities in each of the stages.

In Relationship to Other Staff Members

Supervises work of Office Manager and his staff, food services personnel, transportation personnel, and custodial personnel.

Works with stage level personnel and coordinators to assist them in developing instructional elements of the budget.

Delegates responsibility for personnel to monitor CCTV to ensure student safety and security.

Participates in in-service activities by helping staff devise and implement administrative procedures throughout the school.

In Relationship to Parents and Community

Reports to parents and community on the process, practice and evaluation of administrative procedures in the school.

Articulates philosophy and practices of Fort Lincoln School to visitors and interested groups.

In Relationship to System

Assists in making school-wide policy decision as a member of the Operating Team.

Bears administrative responsibility of building maintenance, delegating special charges to stage teams and students.

Periodically evaluates the use and serviceability of the facility to staff, students, and community.

Coordinates entire budgeting process for the school.

Submits budget to D.C. School System.

Coordinates procurement process for the school.

Administers accounting system, aiding stage level teams in maintaining their own accounting systems.

Makes use of available resources for self-evaluation.

Maintains personal folder of strengths, weaknesses and in-service training activities.

Identifies and eliminates all unnecessary administrative procedures throughout the school.

Communicates with administrative offices of the D. C. School System on behalf of the Fort Lincoln School.

ACTIVITIES AND RESPONSIBILITIES OF STAFF DEVELOPMENT COORDINATOR

In Relationship to Students

Devotes a percentage of his time to instructional activities in each of the stages.

Provides instruction and assistance to students in acquiring knowledge and skills of group dynamics, interpersonal relations, and conflict management.

In Relationship to Other Staff Members

Assists all staff members in defining training needs.

Works with staff members in maintaining profiles of strengths, weaknesses and records of in-service training activities.

Plans, arranges for, and evaluates in-service training activities.

Develops on-the-job orientation and training programs for new staff members.

Participates in stage meetings or conferences which deal with staff development topics.

Maintains overall supervision of staff scheduling, resolving conflicts over vacations, shifts, etc.

Keeps abreast of special courses, institutes, and workshops of potential value to Fort Lincoln staff members.

Assists individuals and teams in developing evaluation techniques of staff performance.

Provides assistance to staff in group process techniques in order to assist teams in maintaining and improving quality of staff interaction.

In Relationship to Parents and Community

Articulates philosophy and practice of Fort Lincoln School to visitors and interested groups.

Draws upon community resources in planning in-service training activities.

Regularly attends community/school meetings.

Solicits community participation in recruitment program.

In Relationship to System

Directs recruitment of new staff members.

Acts as liaison with local teacher training institutions regarding placement and use of student teachers.

Recommends books, magazines, and audiovisual materials relevant to staff development for the Resource Center.

Maintains liaison with D. C. School System Staff Development Office.

Handles administrative work connected with personnel actions — requests for transfer, promotions, etc.

Determines cost of training activities and prepares budget accordingly.

Assists in making school-wide policy decisions as a member of the Operating Team.

Makes use of available resources for self-evaluation.

Identifies areas for personal improvement and takes steps toward professional development.

Participates in special groups or task forces to plan or evaluate system operations.

Utilizes organizational structure to resolve problems.

ACTIVITIES AND RESPONSIBILITIES OF MEDIA COORDINATOR

In Relationship to Students

Instructs children in locating, securing,and using the materials in the Resource Center.

Provides teachers with pertinent information regarding students' progress, problems, and achievements as observed in the resource center.

Assists students in developing competency in listening, viewing,and reading skills.

In Relationship to Other Staff Members

Consults with instructional teams, suggesting multimedia approaches to presentation of lessons and resources available for enhancement of instruction.

Consults with individual teachers on the use of audiovisual materials.

Produces graphic materials required or requested by instructional teams.

Provides and conducts in-service activities related to use of media for groups of teachers.

Keeps teachers informed of available materials and new acquisitions.

Arranges for previews of audiovisual materials.

In Relationship to Parents and Community

Articulates the philosophy and practices of Fort Lincoln School and of the Resource Center to visitors and interested groups.

Regularly attends community/school meetings.

Uses community activities, events,and interests as subject matter for graphics materials and for displays in Resource Centers.

In Relationship to System

Locates, orders,and catalogues books, periodicals, films, filmstrips, slides, etc., for the Resource Center.

Contributes to school reports generated for system or community purposes by providing graphic requirements or suggesting multimedia presentations.

Keeps inventories of audiovisual equipment and materials and selects and purchases same.

Attends workshops, exhibits, conferences and other meetings to learn about the latest developments, materials, and technology available for use in the school.

Develops plans to critically analyze and evaluate effective audiovisual instruction.

Plans expenditure of funds for the Resource Center and keeps records of disbursements.

Requests evaluation of his performance from variety of resources — teachers, students, other coordinators.

Identifies areas for personal improvement and takes steps toward professional development.

Assists in making school-wide policy decisions as a member of the Operating Team.

Utilizes organizational structure to solve problems.

Executes procedures to ensure student safety and security.

Operates and conducts minor repairs of all equipment (tape recorders, controlled readers, projectors, etc.).

Demonstrates operation and potential use of new equipment in relationship to instructional programs.

ACTIVITIES AND RESPONSIBILITIES OF RESOURCE COORDINATOR

In Relationship to Students

Arranges for special programs in the school offered by community groups (theater groups, speakers on social issues, observance or celebration of holiday events, etc.)

Arranges for major field trips to museums, government agencies, local businesses or industries, camping sites, theaters, etc.

Identifies service organizations or activities in the community which can use student help (special drives, reading to the blind, visiting hospitals, etc.)

Devotes a percentage of his time to instructional activities within each of the stages.

In Relationship to Other Staff Members

Collects and disseminates information about instructional resources within the immediate community (people, institutions, service organizations, etc.)

Consults regularly with instructional teams, gathering information on their activities and suggesting use of resources available.

Collects and disseminates information about activities in metropolitan area which are relevant to education program.

Keeps staff informed of community/school meetings.

In Relationship to Parents and Community

Manages volunteer program (recruits; interviews; records interests, capabilities, and time available; arranges for orientation; assigns to stages).

Locates community resources or arranges for community activities in response to requests from instructional teams.

Articulates the philosophy and practices of the Fort Lincoln School to visitors an interested groups.

Solicits evaluative feedback from parents and community regarding performance.

In Relationship to System

Acts as primary liaison between school staff and I. E. C.

Maintains liaison with social agencies and departments of the D. C School System which can supply services to the school.

Assists in making school-wide policy decisions as a member of the Operating Team.

Maintains and updates personal folder on professional development.

Participates in special groups or task forces to plan or evaluate system operations.

Utilizes organizational structure to resolve problems.

Executes procedures to ensure student safety and security.

2.4 The Concept of Staff

In a traditional school, it would hardly be necessary to discuss "the concept of staff." It would be a well-defined, self-understood term. For the Fort Lincoln First Facility, however, the term takes on an expanded meaning. Not only are staff roles, responsibilities, and relationships different, but the staff is extended to include volunteers, student helpers, and consultants. Also, all roles have a teaching dimension to them. This is meant to convey the notion that the staff is not just the full-time employed, certified personnel on the payroll, but all those individuals who can make a contribution to the education program and to children, in whatever capacity they may serve.

One of the challenges is to identify creative and committed people from outside the D. C. Public Schools in the community, in other school systems, in universities, in business organizations, and from other sources, and to find ways to bring them into the program in a meaningful way. If this is done effectively, the capability of the staff will be extended greatly to provide refreshing and renewing staff relationships and to greatly enrich the environment for professional and pupils. One of the primary roles of the resource and staff development coordinators will be to obtain these people and to assist them in working effectively with the full-time staff.

The opportunity to obtain a staff rich in diversity of backgrounds and skills occurs in the initial staffing of the school and in the continuing process of recruitment, selection, and advancement of the staff in the ongoing school.

2.4.1 Initial Staffing

The initial composition of the staff will be extremely important in determining the later pattern. It is imperative that initial recruitment is done on a broad basis both inside and outside the D. C. Public Schools. Simultaneously with the recruitment of full-time staff, there should be a search for the volunteers, specialized consultants, and other resource persons needed to start up the program. This will ensure that the total staff is available for training and for starting up the program on an integrated basis.

One of the most important questions to be addressed is the extent to which the initial staff should be composed of personnel already employed in the D. C. Public Schools. The first Fort Lincoln School must call on available staff in the D. C. schools since it is invaluable to have staff members who know the system, have experience with local children, and know the community. At the same time, the Fort Lincoln School cannot overtax the already short supply of qualified personnel in the D. C. Public Schools. It is also very important to seek talent from outside the system, whenever it exists, to augment the local supply and to provide fresh insights, skills, and enthusiasm.

In order to achieve this balance, the following guidelines should be adopted for initial staffing:

- No more than 50 percent of the initial full-time staff should be from staff presently employed in the D. C. Public Schools.
- All D. C. School personnel wishing to transfer to the Fort Lincoln School should go through the same recruitment, selec-

tion, and training process as those applying from outside the system and should have the right to be reassigned to a similar position if they should wish to return to the regular schools.

- The balance of 50 percent or less should be maintained in all role and salary categories so that D. C. Public School personnel are distributed throughout the staff.
- Staff selection should reflect the provisions of the Judge J. Skelly Wright Decision of 1967 regarding racial factors.
- Volunteers, part-time resource people, and consultants should be recruited, selected, and trained according to similar criteria and in conjunction with the full-time staff.

2.4.2 Annual Staffing

Once the program is initiated, it will be important to continue the process of searching for, obtaining, and organizing additional human resources and to constantly integrate them into the program. This process should be continuous. At the same time there will be the need to fill positions as they become available on a year-round basis. Here again it would seem important to maintain the balance between transfers from inside the system and those from outside who might be able to add a new dimension to the school. It is hoped that the cycle of rotation among roles, upward mobility in advancement, and job turnover will provide a constant renewing of the staff without disturbing the quality of instruction. Use of consultants and resource persons for specialized purposes and for non-recurring needs is one good way of compensating for any weaknesses in staffing. However, the best way is through staff development and careful selection of full-time personnel.

It is recommended that all new full or part-time staff participate in an orientation and training program (see Staff Development) which will prepare them for participating in the program. In addition, they should have free time to observe the stages, to get to know the community, and to become familiar with procedures and practices before they assume their full responsibilities.

2.5 Deployment

To establish the exact number and type of personnel required to operate any individualized instruction school is, at best, a difficult task. The Fort Lincoln School is no exception. The flexibility of the education program and the intent to be responsive to parents' and students' changing needs impose a great deal of uncertainty at this point in time on when and where personnel will be required. The desire to provide instructional coverage for students throughout an extended day (7 AM to 7 PM) requires the presence of teaching and paraprofessional personnel throughout the day; the desire to provide instructional coverage all year round imposes similar requirements. The desire to provide a staff with a complete set of professional competencies requires the availability of teachers with many specialties: language arts, mathematics, special education, science, social studies, music, art, human relations, physical education, and others. And all of the personnel with their special knowledge must be organized so that this knowledge can be brought to bear upon the developing needs of all the children in the Fort Lincoln School. Thus, it should be clear that no one staffing plan (number, organization, types of personnel, schedule, specialty repertoire, etc.) can be regarded as the complete and final plan to satisfy these educational requirements. Many plans are possible. The material below will describe one plan and the rationale for its content. It is believed that this plan is feasible and will provide a responsive, professional, and adaptive educational environment. Of course, it will be necessary for the staff to constantly analyze and adjust the staffing pattern and deployment on the basis of pupil and staff needs.

2.5.1 Constraints

It is useful to preface discussion of the Plan itself with a listing and description of the constraints within which the Plan was designed. These constraints were:

- Instructional needs of children will at all times be met by professional personnel.
- Instructional support functions will at all times be under the supervision of professional personnel.
- The instructional program will be available continuously from 7 AM to 7 PM, six days per week, Monday through Saturday, 12 months per year. Children will attend school at least a total of 180 days per year; they may attend school as many days above the 180 as they and their parents wish.
- Teachers and administrative personnel will regularly work 6 1/2 hours per day, 5 days per week, 11 months per year. The 6 1/2 hours per day includes time for lunch and for instructional planning, parent conferences, etc.
- Paraprofessional personnel will also regularly work 6 1/2 hours per day, 5 days per week, 11 months per year. In-service training when required will take place within this time.
- The Fort Lincoln School will close only on national holidays. The instructional program and/or staff development activities will be available during the current D.C. "school holidays," e.g. the Christmas vacation period.*

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*Staff salaries have been adjusted to reflect the longer work year and the absence of guaranteed observance of "school holidays."

- Professional personnel will not be required to "supervise" during lunch periods. Community volunteers, paraprofessionals, and student helpers will perform these tasks. However, professional and paraprofessional personnel are encouraged to eat lunch with the children and thus provide an opportunity to share social and informal experiences.

- The staff must include personnel with one or more specialities (acquired either through academic preparation or specific work experience). All of the specialities listed below must be represented among staff capabilities.

  - Language Arts
  - Mathematics
  - Art *
  - Music *
  - Behavioral Management *
  - Preschool
  - Science
  - Social Science
  - Eurhythmics *
  - Shop *
  - Physical Education *
  - Special Education *
  - Language Development (in the preschool)
  - Human Relations *

---

*Important to note that "non-academic" teachers are regular staff members, integrated into stage teams, with responsibility to instruct in all subject areas.

The organization of the staff must be such that these special skills can be applied to the learning needs of all the children. This can take place directly in the form of instruction, tutoring, prescription, etc., or indirectly as when one staff member serves as a consultant and resource person to another staff member. Organizational constraints include:

- The ratio of students to professional personnel may vary throughout the day but in no case will exceed 70:1 during instruction. It should be noted that during the time when there are large classes great reliance will be placed on self-instructional materials, paraprofessional personnel, student helpers for scoring and data collection, etc.
- The ratio of students to professional personnel should not be lower than 20:1. The reason for this constraint involves more than mere economy. Individualized instruction not only permits, but indeed attempts to develop independence and self reliance on the part of children. An environment that provides "too many" teachers from whom directions and assistance can be obtained is not an environment that is responsive to children's real needs. This does not mean that children will never receive intense, individualized attention by teachers. In fact, individualized instruction permits such attention to take place more often and to be more directly focused on a child's learning problems than is the case with the traditional classroom. However, the educational environment must be such that the child

perceives it to respond to explicit, articulated needs. The child must sense that he plays the vital part in identifying his learning difficulties, independently trying to solve them using an increasing variety of tools, and then, if necessary, requesting assistance from a teacher. This is one very important aim of the design of the Fort Lincoln School.

2.5.2 Staff Plan Exhibits

2.5.2.1 Summary of Personnel

Figure 2-5 presents the number of staff personnel by stage assignment and salary level. It will be noted that administrative personnel are included in the professional staff since they participate in instructing, prescribing, and planning for the needs of individual students.

2.5.2.2 Distribution of Professional Specialties

Figure 2-6 presents the distribution of instructional specialties by stage and salary level. This distribution reflects the expected requirements of children in each stage. Personnel will work primarily with children in the assigned stage but will be available as consultants to teachers on individual problems with children of other stages. In the Fort Lincoln School, specialized knowledge can be brought to bear upon individual problems in a variety of ways. For example, a teacher with special education training is shown nominally assigned to Stage II. However, this teacher may be responsible for personally advising several children from other stages whose needs dictate such assignment (see Education Plan, Section 1.10, for a description of the role of advisor). In addition, the teacher with competencies in special education may help other teachers with the problems of

Assignment of Personnel
by Stage and Salary Level

Salary Level Stage No. No. of Stud.	15,500 - 19,300 I	14,300 - 15,500 II	10,700 - 14,300 III	8,000 - 10,700 IV	5,400 - 6,000 V	Stud/Prof	Stud/Adul
Stage I 175			2	2	4	44*	22
Stage II 235			3	3	4	39*	24
Stage III-IV 290			4	4	4	36*	24
Admin. Secy.			5		2	*	
			23		14		

2 Sec'y - Typists
12 Teaching Ass'ts
14 Paraprofessionals

18 Teachers
5 Admin.
+ 23 Professionals = 37 Total Staff

* Note that administrative personnel participate in the instructional process and thus these ratios are lower than shown.

Figure 2-5

Professional Specialties
by Stage and Salary Level

15,500-19,300 I	14,300-15,500 II*	10,700-14,300 III	8,000-10,700 IV	5,400-6,000 V	
		● Preschool ● Eurhythmics	● Math ● Lang. Devel.	● ● ● ●	Stage I
		● Spec. Educ. ● Reading ● Math	● Art ● Music ● Human Relations	● ● ● ●	Stage II
		● Math ● Shop ● Science ● Spec. Educ.	● Soc. Sci. ● Phys. Ed. ● Lang. Arts ● Human Rel.	● ● ● ●	Stage III-I
		● ● ● ● ●		● ●	Admin.
		14	9	14	Totals
23 Professionals				14 Paraprofessionals	

● Specialty not assigned.
* Master Teacher selected for possible advancement on the basis of performance in school. Thus, no Level 2 positions in the first year.

Figure 2-6

individual children. This help may consist of interpreting test data, suggesting prescription strategies, identifying behavioral symptoms to watch for, reviewing use of special curriculum materials, etc.

2.5.2.3 Staff Schedule

Figures 2-7, 2-8, and 2-9 display staff assignments that might be made to cover an assumed distribution of student attendance requirements. The assumed student requirements are shown in Figure 2-10. The rationale for this schedule is given below.

We begin by assuming that approximately 10 percent of the student population will choose to attend school on a Tuesday through Saturday schedule, (see Figure 2-10). The remaining 90 percent will attend Monday through Friday. In addition, we assume that, on the average, 30 percent of the children will choose to attend school on Saturday to take advantage of the gymnasium, complete a special project, use the library, see a special film, etc. These assumptions yield the student loads given in Figure 2-10.

Note that there are three separate types of days: Mondays, on which 630 students attend school; Tuesdays through Fridays, on which 700 students attend; and Saturdays on which 280 students attend.

Using these assumptions, we next derive a feasible staff schedule for each type of day. This is shown in Figures 2-7, 2-8, and 2-9. All of the constraints listed in Section 2.2.1 above have been met.

Tuesday - Friday Staff Schedule
(Optimal Level)

Student Load = 700

/Tues - Fri/

	a.m.7	8	9	10	11	12	1	2	3	4	5	6	7	p.m.
Teachers	1	1	1	1	1	-								18
		3	3	3	3	-	3							
			8	8	8	8	-	8						
				3	3	3	3	-	3					
							3	3	3	3	-	3		
	1	4	12	15	15	11	9	11	6	3	-	3		
Admin.	1	1	1	1	1									
			3	3	3	3	-	3						
							1	1	1	1	1			5
	1	1	4	4	4	3	1	4	1	1	1	-		
Assistants	1	1	1	1	1	-								
		4	4	4	4	-	4							
			5	5	5	5	-	5						12
				1	1	1	1	-	1					
							1	1	1	1	1	-		
	1	5	10	11	11	6	6	6	2	1	1	-		
Helpers	3	3	3	3	3	3	3	3	3	3	3	2		35
Volunteers					5	5	5					2		8
Students	70	210	490	490	490	420	560	490	210	210	210	175		
Stud/Prof	35	42	31	26	26	30	56*	33	30	52	210	58		
Stud/Staff	23	21	19	16	16	21	35	23	23	[illegible]	105	58		
Stud/Adult	23	21	19	16	14	17	27	23	23	42	105	25		

Prof = Teachers + Admin.
Staff = Teachers + Admin. + Assistants
Adults = Teachers + Admin. + Assistants + Volunteers

* Lunch Period

Figure 2-7

Saturday Staff Schedule

Student Load = 280

	a.m.7	8	9	10	11	12	1	2	3	4	5	6	7 p.m.	
Teachers	1	1	1	1	1									
				2	2	-	2	2	2					
							1	1	1	1	-	1		4
Total	1	1	1	3	3	-	3	3	3	1	-	1		
Admin.			1	1	1	1	1							1
Assistants		1	1	1	1	-	1							
							1	1	1	1	-	1		2
		1	1	1	1	-	2	1	1	1	-	1		
Helpers	1	1	1	1	1	1	1	1			1	1		10
Volunteers					2	2	2							2

Student Load	7	7	42	147	147	77	210	168	133	28	28	
Stud/Prof	7	7	21	37	37	77*	52	56	44	28	-	-
Stud/Staff	7	4	14	29	29	77	35	33	33	28	28	-
Stud/Adult	7	4	14	29	21	19	26	33	33	28	28	-

Prof = Teachers + Admin.
Staff = Teachers + Admin. + Assistants
Adults = Teachers + Admin. + Assistants + Volunteers

* Lunch Period

Figure 2-8

Monday Staff Schedule

Student Load = 630

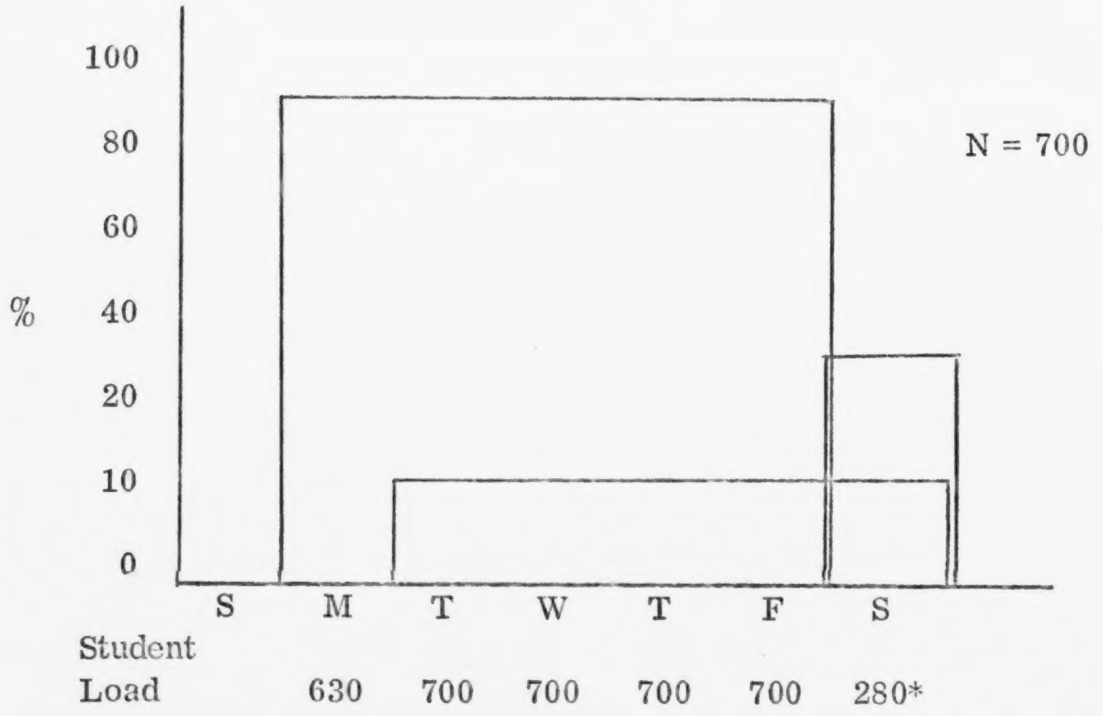
	a.m.7	8	9	10	11	12	1	2	3	4	5	6	7 p.m.	
Teachers		1	1	1	1	-	1							14
		2	2	2	2	-	2							
			5	5	5	-	5	5						
				2	2	2	-	2	2					
							1	1	1	1	1			
								3	3	3	3	3		
	0	3	8	10	10	2	9	11	6	4	4	3		
Admin.	1	1	1	1	1									4
			2	2	2	-	2	2						
						1	1	1	1	1				
	1	1	3	3	3	1	3	3	1	1				
Assistants	2	2	2	2	2									10
		2	2	2	2	2								
			3	3	3	-	3	3						
								3	3	3	3	3		
	2	4	7	7	7	2	3	6	3	3	3	3		
Helpers	2	2	2	3	3	-	3	3	2	2	2	1		25
Volunteers					3	3	3							3
Student Load	63	189	441	441	441	378	504	441	189	189	189	158		
Stud/Prof	63	47	40	34	34	126*	42	32	27	38	47	53		
Stud/Staff	21	24	25	22	22	76	34	22	19	24	27	26		
Stud/Adult	21	24	25	22	19	47	28	22	19	24	27	26		

Prof = Teachers + Admin.
Staff = Teachers + Admin. + Assistants
Adults = Teachers + Admin. + Assistants + Volunteers

* Lunch Period

Figure 2-9

Assumed Student Loads by Day of the Week



* Of these, 70 attending on Saturday in lieu of weekday and 210 attending as "extracurricular" activity.

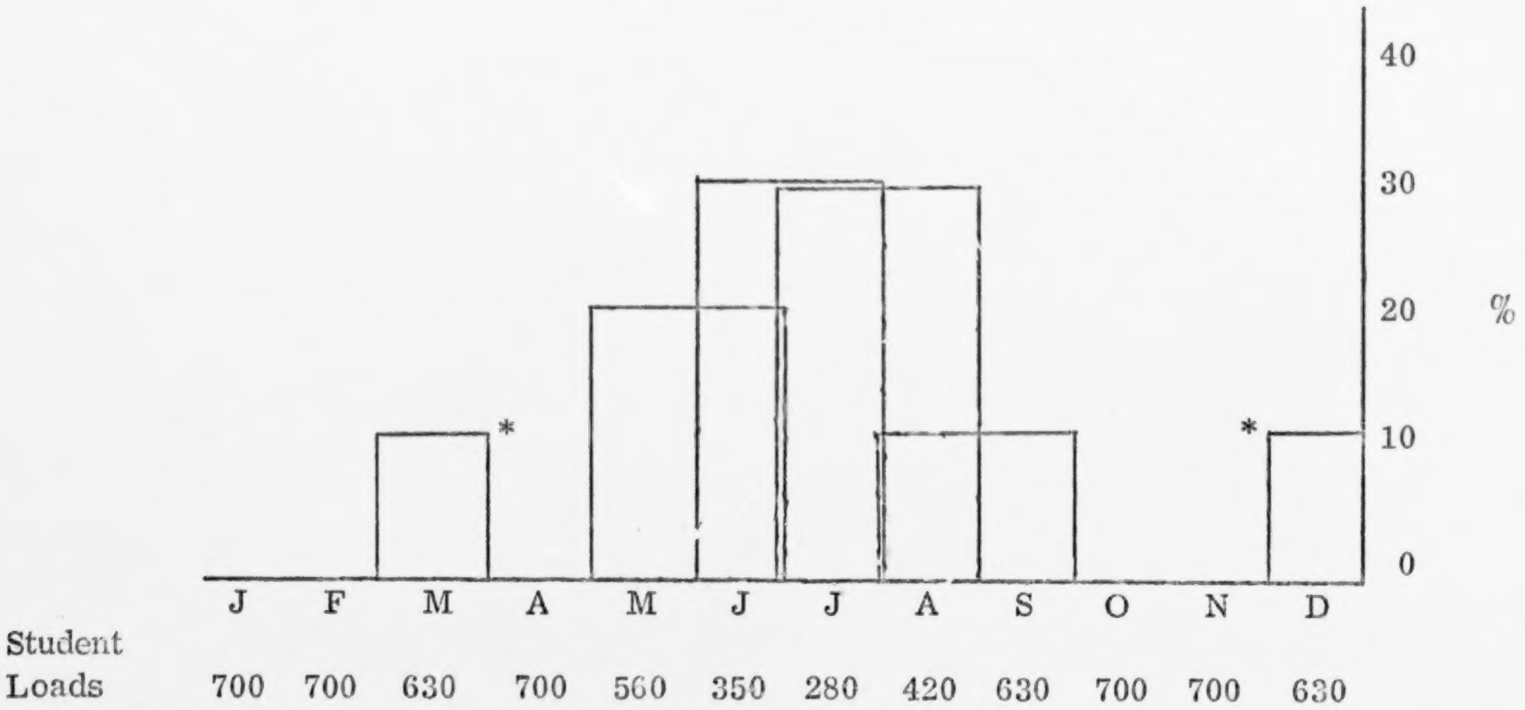
Figure 2-10

Finally, the effects of student vacations on staff vacation schedules are considered. Figure 2-11 shows the assumed distribution of desired student vacations. For purposes of simple illustration, most of the vacations are shown as being continuous, (i.e., each child is on vacation for two successive months). Ten percent of the students are shown as taking split vacations, one month at Easter and one month at Christmas. The resulting student loads are also shown in Figure 2-11. Figure 2-12 shows our assumptions about the distribution of vacation times that will be desired by the staff. While these are assumptions, they were made independently of the student distributions. Figure 2-13 shows the resulting loads and the ratio of students to professional staff (teachers, administrators, and assistants). These are believed to be reasonable.

The above simplified illustration has ignored any consideration of maintaining a balance of personnel types during vacation periods (i.e., teachers, administrators, and assistants). Likewise, scheduling constraints caused by the desire to maintain a balance of professional specialties and the desire to coordinate the vacations of individual children and their advisors so as to maintain continuity have been ignored. These considerations can only be factored in at the time that vacation selections have been made by children (generally two months advance notice will be required).

One final factor that might lead to questions is that of absences. It is believed that the individualized instruction system designed for the Fort Lincoln School will accommodate normal absence patterns (both on the part of children as well as staff) without recourse to substitute personnel. In the event of extended or mass absences, substitute personnel can be retained with perhaps some overtime required from the regular staff (to be paid for). Substitute personnel will take over the role of assisting children with instructional questions, tutoring, and group instruction while the regular staff continues the roles of planning and prescribing.

Percent of Students on Vacation
by Month
(Each student taking two months of vacation)



* 10% of student body for one month. (Hypothetically these are the same 70 students.)

Figure 2-11

Staff On Vacation

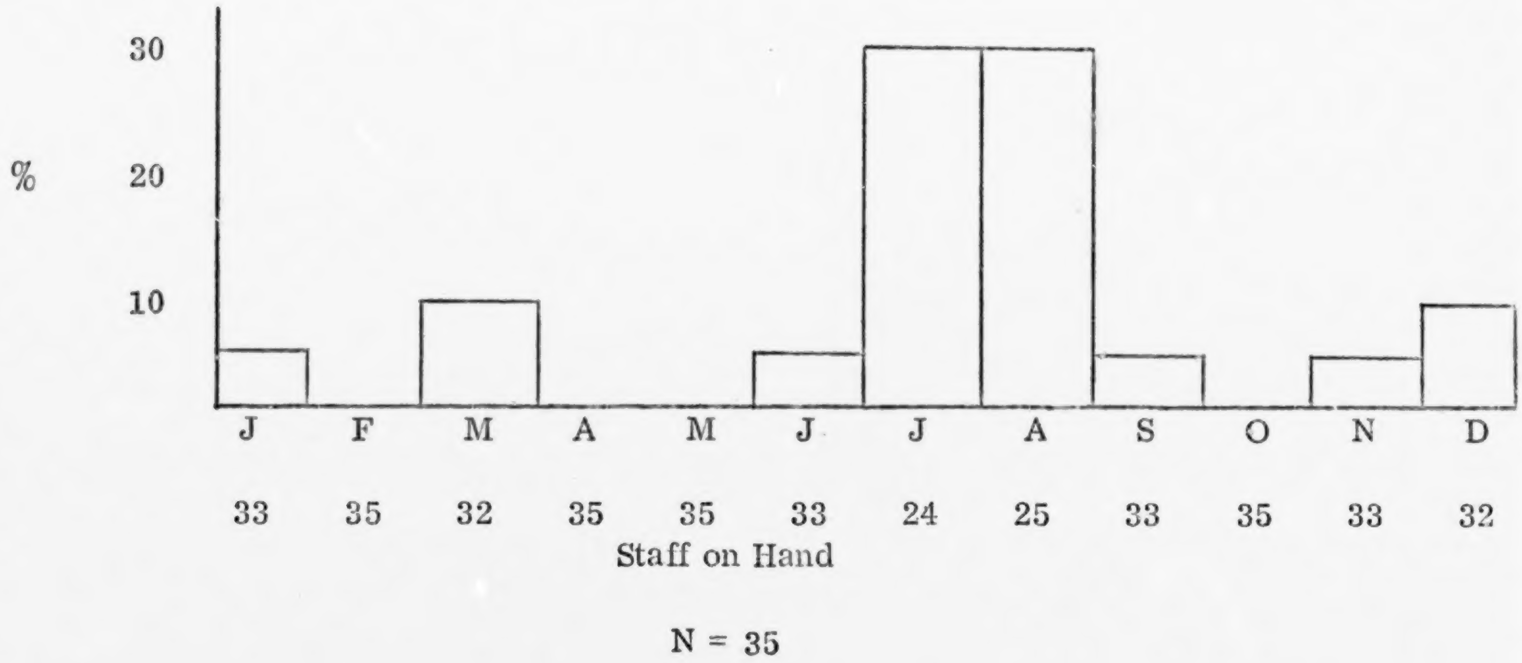


Figure 2-12

Number of Staff and Students
in School by Month

N = 35 Total Staff (excludes 2 secy's)

Note: Student load and staff on hand are plotted on different scales.

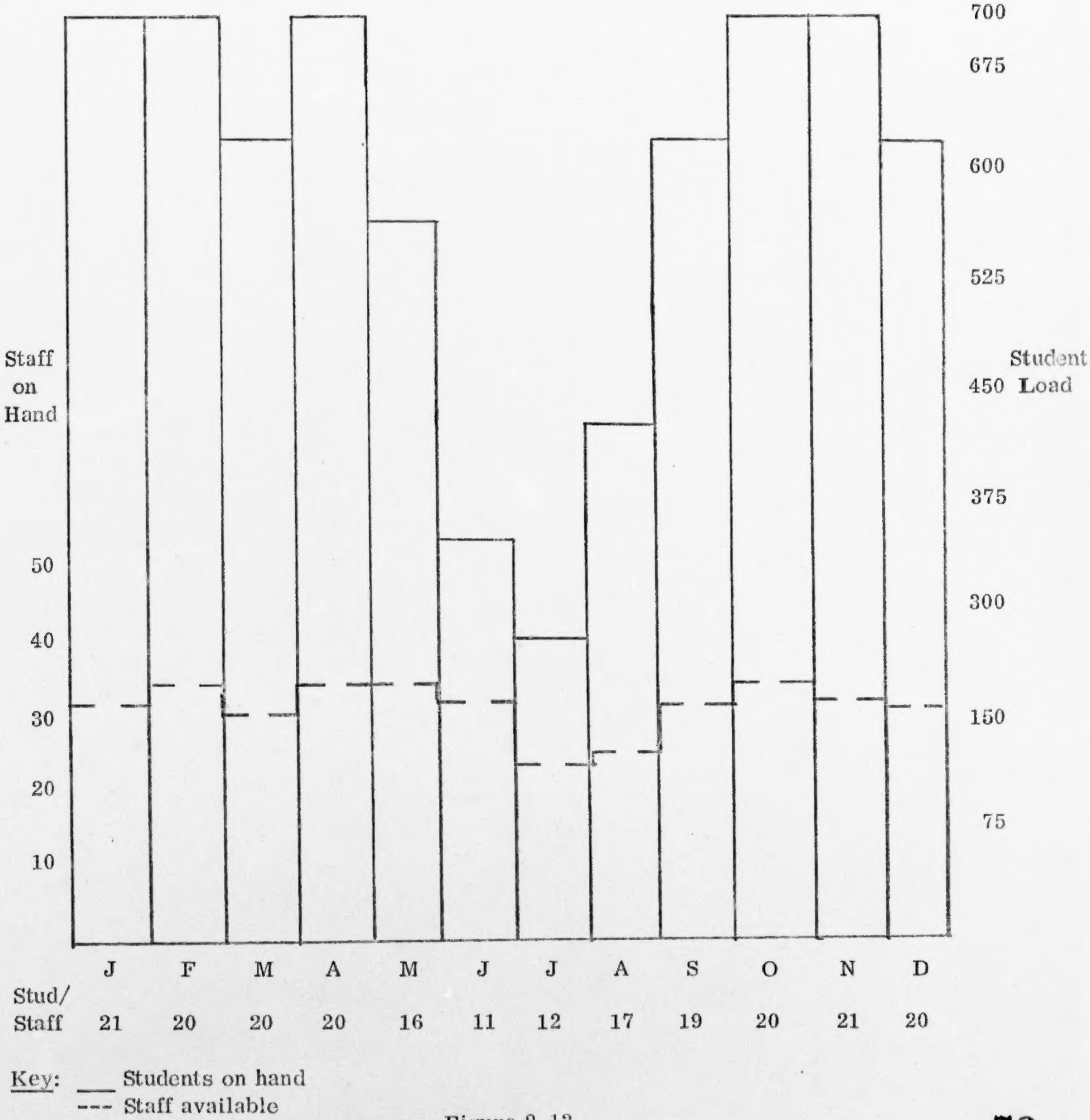


Figure 2-13

the vacations of individual children and their advisors so as to maintain continuity have been ignored. These considerations can only be factored in at the time that vacation selections have been made by children (generally two months advance notice will be required).

One final factor that might lead to questions is that of absences. It is believed that the individualized instruction system designed for the Fort Lincoln School will accommodate normal absence patterns (both on the part of children as well as staff) without recourse to substitute personnel. In the event of extended or mass absences, substitute personnel can be retained with perhaps some overtime required from the regular staff (to be paid for). Substitute personnel will take over the role of assisting children with instructional questions, tutoring, and group instruction while the regular staff continues the roles of planning and prescribing.

2.6 Recruitment

2.6.1 Criteria

Since the Fort Lincoln New Town School will be a new entity, certain recruitment criteria must be addressed. These criteria include the following:

- That recruitment begin at least one year before the opening of the school to ensure sufficient time for interviews, observations, reviews by various groups involved;
- That recruitment personnel have at their disposal the criteria for staff selection;
- That staff be brought on board in time for the Phase I Staff Development program;
- That recruitment procedures grow out of the combined criteria generated by the Planners, the Special Projects Division of D. C. Public Schools, the FLNT community, and the Interim Education Committee;
- That recruitment constraints generated by the Special Projects Division and the FLNT community be in the possession of recruitment personnel before recruitment begins;
- That staff to be recruited should be especially sensitive to FLNT area needs and expectations;
- That the D. C. Public Schools provide up to 50 percent of those working in the first Fort Lincoln School;
- That, where possible, support staff (custodial, maintenance, dietician) resides in the FLNT area;

- That personal qualifications and experience be considered as important as the educational qualifications of prospective staff. (This is specified in Section 4.5.1 of the Community Participation Plan.)
- That volunteers, resource personnel, and consultants be recruited through a process similar to that for full-time staff.

2.6.2 Sources of Personnel

2.6.2.1 D. C. Schools

As specified earlier, up to [redacted] percent of the full-time staff for the new Fort Lincoln School will be sought from the D. C. Schools. This implies that teachers now working in the D. C. Schools who are eligible for transfer may wish to transfer to the Fort Lincoln School and should have the opportunity to do so. The Special Projects Division will be able to negotiate transfers and any administrative changes necessary in order to comply with D. C. transfer regulations. However, those teachers who wish to transfer must be conducted through the same screening procedures faced by candidates from outside the D. C. Public School System.

2.6.2.2 Immediate Community

In addition to those candidates sought within the D. C. Schools, candidates from the immediate FLNT area will be encouraged to apply to teach and to act as additional resources within the school setting.

Student helpers will also be recruited to assist the staff. It is expected that they will be paid $1.50 per hour. The Personnel Subcommittee of the I. E. C.* and the Implementing Agent will work out the details of recruiting and selecting these students.

2.6.2.3 Washington, D. C. Metropolitan Area

The Washington, D. C. Metropolitan area will act as a further resource of prospective candidates and should be canvassed for appropriate personnel.

2.6.2.4 Other

Some service oriented groups and agencies will be contacted for recruiting staff, including:

- Local and nationwide universities.
- Other innovative school programs.
- Foreign systems that specialize in innovative and individualized methods in the field of education - Leicestershire.
- Peace Corps returnees.
- Urban Service Corps.
- National service fraternities.
- NEA SEARCH, Washington, D. C.
- Montessori and other non-public school programs, including parochial schools.

2.6.2.5 Volunteers

Permanent staff will not be able to function in the most effective and efficient manner without assistance. Volunteers are needed to support the instructional process, to create staff cohesiveness by permitting additional time for planning, and to act as suitable role models for students in the school. Volunteers are expected to be recruited from the PTA, I. E. C., FLNT Council, and other interested community groups.

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* See Community Participation Plan, Section 4.5.4 (p. 4-21)

Volunteers act as unofficial representatives of the community. They should be asked to meet criteria similar to that which permanent staff is asked to meet, with the exclusion of academic requirements.

Volunteers will be assisted in the school by the Resource Coordinator.

2.6.3 Recruitment Process

Finding the right person for a given job in the Fort Lincoln education system is a high priority both in the context of planning and operations: planning because no matter how well articulated, the written plan will never be carried out effectively without the "right" persons performing at their best; and operationally because only the "right" persons can perceive the goals of the system and make the best use of existing opportunities to achieve them. An important aspect of the process of seeking the "right" persons will be the approach used by the Recruitment Team.

A further consideration in the recruitment process is the time span needed to devise a series of recruitment approaches, observations, and interviews. The recruitment process should be started as soon as the system, school, and community constraints are clearly delineated.

The interview process involves a consideration of objectives, criteria, constraints, etc., leading to the selection of the "right" persons and to the eventual development of a creative, cohesive staff in the first Fort Lincoln School.

- Recruitment Team

  The Recruitment Team will be composed of representatives of the General Learning Fort Lincoln Project Team, the Special Projects Division, the D. C. schools Personnel Office, and the I. E. C. The function of the Team will be to ensure that there is a plentiful supply of highly qualified potential candidates available from which to select the school staff. This will require preparing and disseminating recruitment materials, follow-up interviews, screening, orientation, and consultation during selection and training.

  The Recruitment Team must have at its disposal clearly defined criteria for selection of staff. The Team must be experienced in detecting certain individual characteristics of people and in judging individual behavior in a group context. In addition, it will be necessary to visualize the staff at various points in time, i. e., preservice, beginning operations, mid-operations, first year end, second year beginning.

- School Administration

  The Fort Lincoln School administration (Special Projects Division) will screen prospective staff members in relation to selection criteria. In addition, it will cooperate with the FLNT community and the recruitment staff as outlined in Process for Agreement. The D. C. school administration will effect transfers from within the system and will utilize the criteria for selection as listed in this report.

- Community

  The I. E. C. Personnel Subcommittee will screen prospective staff members, emphasizing personal qualifications. Screening instruments will include observations, interviews, and application forms.

2.6.3.1 Compilation of Staff Profiles for Prescriptive Purposes

During the recruitment and selection process, initial profiles of potential staff members will be developed which can be used to prescribe additional training and/or orientation during the preservice period. The profiles need not be lengthy, but should be accurate and easy to read for pertinent information. An example of this need follows:

> A highly skilled teacher will be hired. This teacher is acceptable, but has little experience in responding to community needs. Her profile indicates that she should participate in the Phase I Staff Development program, and that an in-service experience may not be called for if the preservice experience is successful.

The staff profiles will be similar in many ways to student profiles. As student profiles are a required part of the development of a student's growth, profiles of teachers will be used to plan a teacher's pre- and in-service training, assist the teacher in self-evaluation, provide a record of growth for peer evaluation, and provide a record of teacher-student interaction. Prescriptions thus formulated will be soundly derived and will form a firm base for future planning.

Profiles in the recruitment stage will necessarily be sketchy, but a process will be started that is extremely useful and can be expanded over a period of time. A sample profile and prescription are shown on the following pages.

INDIVIDUAL PROFILE To be completed by applicant

Section I

NAME

ADDRESS

CITY & STATE | PHONE

TRAINING: ☐ PHD ☐ MA ☐ AB ☐ MAT ☐ Other | EXPERIENCE: ☐ 1-5 YRS. ☐ 5 YRS. +

TEACHING CREDENTIALS: ☐ COL. ☐ SECONDARY ☐ PRIMARY ☐ PRE-SCHOOL | EXPERIENCE: ☐ 1-5 YRS. ☐ 5 YRS. +

☐ 1-5 ☐ 5+ ☐ MATH ☐ 1-5 ☐ 5+ ☐ SCIENCE ☐ 1-5 ☐ 5+ ☐ ENGLISH ☐ 1-5 ☐ 5+ ☐ READING ☐ 1-5 ☐ 5+ ☐ VOCATIONAL

☐ 1-5 ☐ 5+ ☐ ANTHROPOLOGY ☐ 1-5 ☐ 5+ ☐ PSYCHOLOGY ☐ 1-5 ☐ 5+ ☐ SOCIOLOGY ☐ 1-5 ☐ 5+ ☐ SOCIAL STUDIES

URBAN TEACHING EXPERIENCE: ☐ 1-5 ☐ 5+ | FOREIGN TEACHING EXPERIENCE: ☐ 1-5 ☐ 5+

ADMINISTRATIVE EXPERIENCE: DOMESTIC ☐ 1-5 ☐ 5+ FOREIGN ☐ 1-5 ☐ 5+

AGE: ☐ 25 ☐ 25-40 ☐ 40+ | SEX: ☐ M ☐ F | ☐ MARRIED ☐ SINGLE | CHILDREN: ☐ YES ☐ NO | ☐ GRAD. STUDENT

CURRENT SALARY: ☐ 5-10K ☐ 11-15K ☐ 16-20K

EMPLOYMENT: ☐ UNIVERSITY ☐ FEDERAL AGENCY ☐ PUBLIC SCHOOL ☐ D. C. System

EMPLOYMENT - CONT.: ☐ PERMANENT ☐ PRIVATE SCHOOL ☐ Other ☐ FOUNDATION

EXPERIENCE: ☐ RESEARCH/WRITING ☐ I/A-T-GROUP ☐ COMM. RELATIONS ☐ A-V

EXPERIENCE - CONT.: ☐ PROGRAM PLANNING ☐ EXPERIMENTAL PROJECT ☐ BUDGET & FINANCE

Special Experience

What workshops have you attended? ____________

Have you designed curriculum? ____________

Have you had experience with micro-teaching? ____________

Have you attended sensitivity, T group, or laboratory encounter sessions? ____________

SPECIAL LINGUISTIC CREDENTIALS AND/OR EXPERIENCE ☐ | PUBLICATIONS: ☐ YES ☐ NO

Section II

What do you feel are your strengths? ____________

What do you feel are your weaknesses? ____________

What special skills or hobbies do you have? ____________

What innovative programs have you participated in? ____________

Section III

What would you do if in your area there were two teachers, three assistants, four student helpers, and two volunteers who are responsible for 100 students and materials were lost for 30 students?

____

DIRECTIONS: Read each item and place a check in the column that applies to you.

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE NOT DONE THIS BUT THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHERS
1. I APPROACH THE YOUNG CHILD AS A LEARNER THROUGH HIS DEVELOPMENTAL LEVEL:							
a. Study of his physical development.........	✓						
b. Study of his emotional development........	✓						
c. Study of his social development...........	✓						
d. Study of his intellectual development.....	✓						
2. I APPROACH THE YOUNG CHILD AS A LEARNER THROUGH HIS GENERAL BEHAVIOR:							
a. Study of the child in peer relations	✓						
b. Study of his social situations out of school....................................	✓						
c. Study of his relations to adults in the school situation..........................	✓						
d. Study of his self image or self concept...	✓						

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE NOT DONE THIS BUT THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHERS	
3. I APPROACH THE CHILD AS A LEARNER THROUGH RESOURCES IN HIS INDIVIDUAL INVENTORY:								
a. Health records....................								
b. Achievement records................								
c. Ability test information...........								
d. Anecdotal records..................								
e. Social/family history..............								
f. Psychological records..............								
g. Audio-video reports................								
h. Studying conference reports........								
i. Reports of daily classwork.........								
4. I APPROACH THE CHILD AS A LEARNER THROUGH CONSULTATION WITH RESOURCE PERSONNEL:								
a. Parents and family.................								
b. Fellow teachers....................								
c. Guidance/psychological specialists.								
d. Administrative personnel...........								

(Item 4 cont'd)

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE NOT DONE THIS BUT THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHERS	
e. Community agency personnel......... /								
f. Social caseworkers............... /								
g. Health specialists............... /								
5. I ENGAGE IN INDIVIDUALIZED INSTRUCTION BY PRACTICING THE FOLLOWING:								
a. Writing instructional objectives in behavioral terms............... /								
b. Pre-assessing the child's progress toward objectives................ /								
c. Determining the student's learning style......................... /								
d. Preparing individual prescriptions of learning activities............ /								
e. Retesting to determine his changes in performance.................. /								
6. I ADAPT MY INDIVIDUAL TEACHING STYLE TO THE REQUIREMENTS OF THE INDIVIDUAL LEARNING SITUATION BY THE FOLLOWING:								
a. Adjusting the directness or indirectness of influence that I exert on the learning situations. /								
b. Modifying my degree of formality in managing classroom activities..... /								
c. Adjusting the degree of personal involvement I exercise in teacher-pupil relationship............. /								

(Item 6 cont'd)

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE NOT DONE THIS BUT THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHERS	
d. Adapting the intensity level of media and stimuli I employ.....								
e. Modifying the concreteness-abstraction level of operations.........								
7. I PREPARE THE LEARNING ENVIRONMENT FOR THE DAILY CURRICULUM BY MODIFICATIONS OF THE FOLLOWING:								
a. Arranging furniture..............								
b. Arranging displays...............								
c. Arranging use of learning spaces.								
d. Timing activities................								
e. Scheduling activities............								
f. Pacing activities................								
g. Using large-group activities.....								
h. Using small-group activities.....								
i. Using independent activities.....								
j. Using student - centered activities								
k. Using teacher - directed activities								
l. Arranging conditions for pupils accessibility to materials.......								
m. Arranging conditions for teacher efficiency.....................								

(Item 7 cont'd)

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE NOT DONE THIS BUT THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHERS
n. Arranging conditions for safety....							
o. Arranging conditions for freedom of constructive movement............							
p. Arranging conditions for pupil self direction in learning............							
q. Arranging conditions for multi-age learning....................							
r. Arranging conditions for utilization of human resources							
(1) Paraprofessionals...........							
(2) Parents....................							
(3) Community resource personnel..							
(4) Supervisory/administrative staffs							
(5) Other teachers..............							
(6) School specialists...........							
s. Arranging conditions to stimulate specific learning:..............							
(1) Critical analysis							
(2) Communications..............							
(3) Social interaction...........							
t. Arranging conditions for formal evaluation.......................							
u. Arranging conditions for informal evaluation.......................							

8. I UTILIZE MATERIALS AND EQUIPMENT FROM THE BROAD SPECTRUM OF MULTI-MEDIA:—

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE NOT DONE THIS BUT THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHERS	
a. Film strip projection..........	✓							
b. Record player..................	✓							
c. Tape recorder..................	✓							
d. Film projector.................	✓							
e. Overhead projector.............	✓							
f. Listening stations.............	✓							
g. Language master................	✓							
h. Opaque projector...............	✓							
i. Controlled reader..............	✓							
j. Typewriter.....................	✓							
k. Adding machine.................	✓							
l. Video-tape recorder............	✓							
m. Radio..........................	✓							
n. Television.....................	✓							
o. Microscope.....................	✓							
p. Slide camera...................	✓							
q. Slide projector................	✓							
r. Chalkboard.....................	✓							

(Item 8 cont'd)

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE NOT DONE THIS BUT THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHERS
s. Abacus							
t. Still camera							
u. Cartridge film projector							
v. Book materials							
w. Magazine materials							
x. Newspaper materials							
y. Mimeo/ditto materials							
z. Teacher prepared materials							
a1 Student prepared materials							
b1 Chemicals							
c1 Earth resources							
d1 Matter-energy resources							
e1 Sensorial materials							
f1 Zoological specimens							
g1 Botanical specimens							
h1 Paper							
i1 Writing implements							
j1 Models							

(Item 8 cont'd)

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHER	
k1 Maps..............................							
l1 Globes............................							
m1 Flat pictures.....................							
n1 Three-dimensional artifacts.......							
o1 Blocks............................							
p1 Puzzles and games.................							
q1 Easels............................							
r1 Paints............................							
s1 Clay..............................							
t1 Wood..............................							
u1 Crayon............................							
v1 Sand..............................							
w1 Water.............................							
x1 Dramatic play material............							
y1 Cuisenaire rods...................							
z1 Numeration materials..............							
a2 Block printing materials..........							
b2 Geometry materials................							

(Item 8 cont'd)

	THIS ITEM IS NOT CLEAR	I HAVE NOT DONE THIS	I HAVE NOT DONE THIS AND DON'T THINK I SHOULD	I HAVE NOT DONE BUT THINK I SHOULD	I HAVE DONE THIS OCCASIONALLY	I HAVE DONE THIS OFTEN	I HAVE DEMONSTRATED THIS TO OTHER TEACHERS	
c2 Weight and balance materials.......	\							
d2 Templates..........................	\							
e2 Health and nutrition materials.....	\							
f2 Tapes and recordings...............	\							
g2 Musical instruments................	\							
h2 Outdoor equipment..................	\							
i2 Perceptual-motor equipment.........	\							
j2 Household tools....................	\							
k2 Field trips........................								
9. I ENGAGE IN SYSTEMATIC OBSERVATION OF CLASSROOM INTERACTION THROUGH THE FOLLOWING								
a. Analyzing the patterns which affect emotional climate..............	\							
b. Analyzing the language patterns..	\							
c. Analyzing the thinking patterns..	\							
d. Analyzing the physical patterns..	\							
e. Analyzing the learning-style patterns	\							

MA/bc

SAMPLE

STAFF DEVELOPMENT PRESCRIPTION FORM

Name ____________________

Position ____________________

Objective	Activity	Expected Date of Completion
1. Academic work in tests and measurements	1. 310 Educational testing at Catholic U. Spring Semester	June 1971
2. Improvement in observation skills	2. Attend in-service training program "Observation of Developmental Behavior" week of 10/5, 10/19, and 11/2 (1 hour each session): pass criterion test with score of 90%	Nov. 6, 1971
3. Experience working with the learning sequences in the typing booth	3. 10/2 Review written procedures. 10/7 9^{30}-10^{am} observe Mrs. Crane (para professional) working with students 10/9 9^{30}-10^{am} work with students (Mrs. Crane stand by) 10/12 9^{30}-10^{am} Demonstrate for Mrs. Baxter (Master Teacher) doing each sequence at least once.	Oct. 12, 1971

Comments: Arrange with stage team for time to attend all day conference in test construction at University of Maryland 10/23.

2.6.3.2 Observations and Interviews

At least eight months will be required to carry out personnel recruitment. Three months will be required for approval of positions by the Board of Education, announcement of the approved positions, and advertising for these positions. Another three months will be required to observe, interview, and screen candidates. An additional two months will be required for their approval by the I. E. C., school core staff, and the Board of Education. Included in the last two months are their certification and appointment.

After preliminary contacts have been made, observations of prospective staff members will begin with a scheduled visit to an institution which can provide the types of staff needed. The Recruitment Team will begin to schedule interviews and follow-up, after which the Special Projects Division and the Personnel Subcommittee will undertake appropriate screening. Referral of prospective staff members to the D. C. Schools for approval, certification, and appointment will take place after initial contacts, visits, observations, interviews, screening, and approval by the Personnel Subcommittee of I. E. C. and the Special Projects Division. Appropriate forms and schedules will be developed to facilitate this process. (See the Community Participation Plan.)

2.6.3.3 Process for Agreement

The following process agreement scenario describes how agency agreement will take place.

> The Recruitment Team gathers information regarding contacts. Visits are made and the Team interviews applicants and records observations. Interviews are also scheduled for those who do not require visits. The

Recruitment Team develops and gives profiles to the Special Projects Division and the Personnel Subcommittee. The Special Projects Division schedules interviews between the candidates and the Personnel Subcommittee. The Personnel Subcommittee develops an approved list and sends it to the Special Projects Division. The Special Projects Division, if no disagreement develops, forwards the list and accompanying required documents to the Board of Examiners for approval, certification, and appointment. Should a disagreement arise, the Special Projects Division will request a new decision from the Personnel Subcommittee. If no agreement is reached, Special Projects Division shall mediate and/or adjudicate. Figure 2-14 on the following page is a diagram of this process.

2.6.3.4 Screening

The Recruitment Team will provide initial screening inputs to the Personnel Subcommittee and the Special Projects Division. Screening here is meant not only to eliminate undesirable candidates, but will also serve to further refine recruitment criteria. As the recruitment effort unfolds, all parties to the process will be better able to refine their objectives. Screening will be well coordinated if the preliminary phases of establishing criteria, observing, visiting, and interviewing are carried out efficiently.

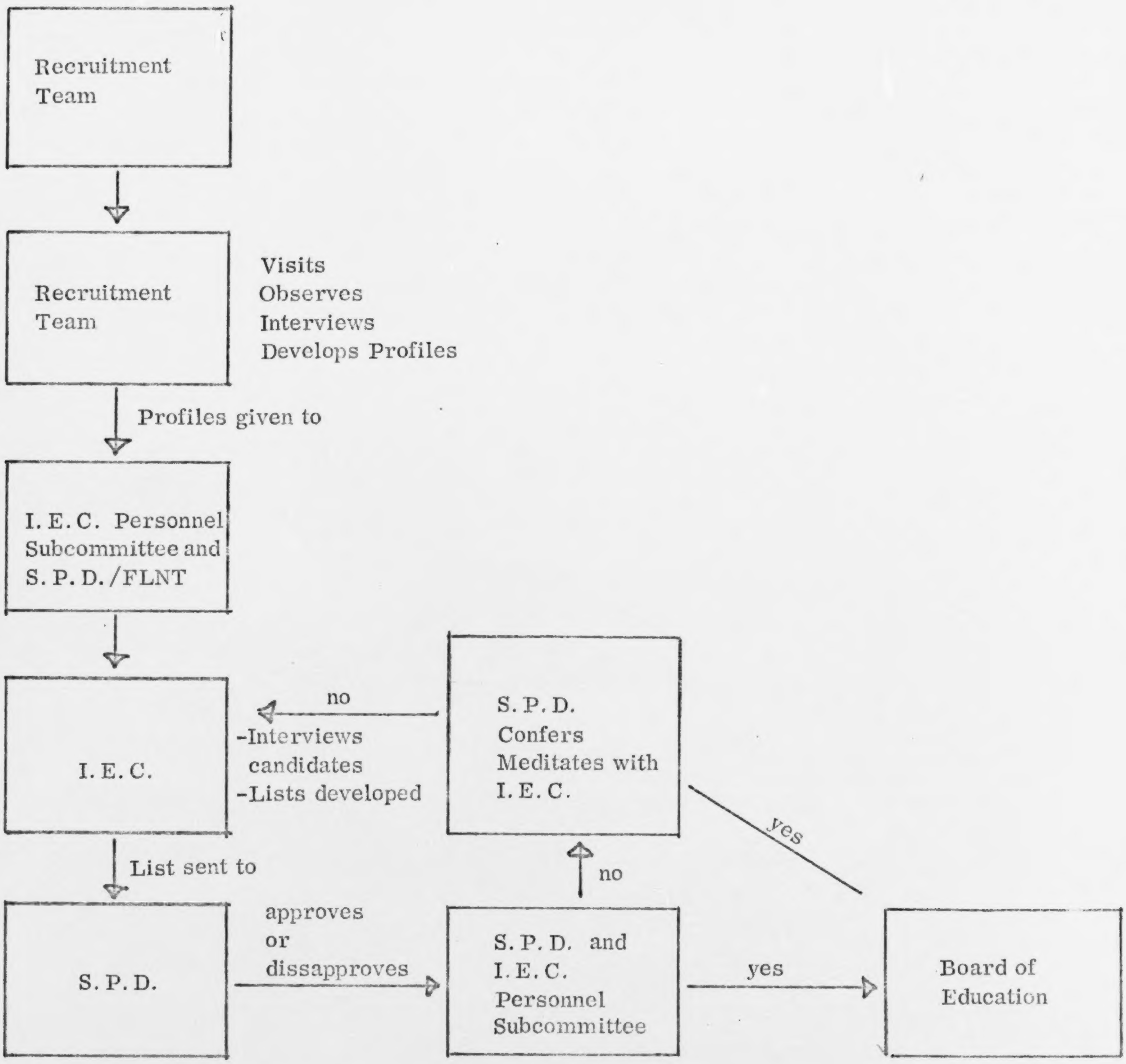
Recruitment Team
Recruitment Team
Visits
Observes
Interviews
Develops Profiles
Profiles given to
I. E. C. Personnel Subcommittee and S. P. D./FLNT
I. E. C.
-Interviews candidates
-Lists developed
no
S. P. D. Confers Meditates with I. E. C.
yes
List sent to
S. P. D.
approves or dissapproves
no
S. P. D. and I. E. C. Personnel Subcommittee
yes
Board of Education

Figure 2-14

2.7 Selection

2.7.1 General Criteria for Selection

This section treats general criteria for selection in terms of staff contributions to the Fort Lincoln First Facility education program. The essential criteria, of course, are interest in and commitment to working with children, but it is assumed that all potential candidates will be prescreened for these attributes. All criteria related here pertain to personal and/or professional requirements that future staff members should possess prior to the selection process. Applicants need not meet all the criteria, but should be prescreened to determine if they are capable of meeting most criteria.

Several people will be selected as alternate staff members. This procedure would provide a small reserve of trained people in addition to the full staff and allow for withdrawal by anyone who decided during the program that he did not wish to work in the Fort Lincoln School. Any alternate participating in the Phase I Staff Development program but who does not remain on the Fort Lincoln staff would be assured of a position in some other school in the District.

2.7.1.1 Openness to Change

One of the chief characteristics of Fort Lincoln School staff members must be their adaptability to changing requirements. Therefore, the Recruitment Team must be especially conscious of those special people who possess this characteristic. Further, the Team must seek to identify those people interested in the FLNT concept.

The following characteristics exemplify what is meant by openness to change:

- An openness to novel approaches and solutions to educational problems.
- An ability to project a personal desire to learn.
- An ability to tolerate high levels of ambiguity and to maintain personal stability in conflict situations.
- Some experience in working effectively with minority group people in or out of the field of education.

2.7.1.2 Skills, Strengths, and Weaknesses

By developing the staff profiles previously outlined, the Recruitment Team should be able to provide initial quality information to the Personnel Subcommittee and the Special Projects Division in terms of the skills, strengths, and weaknesses of prospective staff members. The information will be presented to these bodies in a format which defines the level of skills, degree of strengths, etc. according to the rating system developed by the Recruitment Team.

Skills fall into special categories:

- Subject matter
- Arts, crafts
- Technical - electrical, woodworking
- Research techniques
- Community organization, social action

Some strengths are:

- Ability to work effectively with peers, parents, and students.
- Ability to learn to adapt.

Some weaknesses are:

- Inability to plan ahead.
- Evidence of poor judgment.

All the skills, strengths, and weaknesses will be entered into the profile folder, with permission of the candidate, and will form a core of information for use in individualizing Phase I Staff Development activities.

2.7.1.3 Adaptiveness to Team Effort

There are persons who work particularly well in a team setting and these are persons that the Recruitment Team must seek. Since this characteristic can only be determined through observation, it is suggested that observing candidates should be an important part of the recruitment process.

2.7.1.4 Leadership and Development Potential

It would appear that leadership qualities conflict with the notion of team effort because all persons cannot act as leaders all of the time. In reality, however, no leader acts as a leader all of the time; he or she must also support others in their efforts part of the time or act in a resource capacity. Maturity here would seem to be the distinguishing characteristic to be sought. A mature person (young or old) will be able to behave as the situation demands, acting as leader, a support person or as a resource person. Maturity usually comes with experience but this is not always the case. Certainly the potential for mature behavior exists in most people and the Fort Lincoln School is no less a training ground than any other in the United States. Therefore, qualities of leadership and team work are not necessarily incompatible, but merely harder to find. Some of these qualities include:

- Ability to take the initiative in solving education problems.
- Ability to generate incentives for volunteer involvement in school activities.
- Capacity to remain attuned to the individual needs of students.

2.7.1.5 Recruitment Follow-On

Recruitment will continue under the direction of the Fort Lincoln Program Director with the assistance of the Staff Development Coordinator after initial staff has been appointed.

2.7.2 Procedures

2.7.2.1 Interim Education Committee

The Interim Education Committee will delegate the responsibility for screening candidates for staff positions in the FLNT system to the Personnel Subcommittee. Procedures described in Section 2. 6. 3. shall be followed.

2.7.2.2 Certification

The regular procedures of the D. C. Board of Education for certification will be followed after proper approval by the FLNT community and the Special Projects Division.

2.7.2.3 Appointment

The regular procedures of the D. C. Board of Education for appointment will be followed after proper approval by the FLNT community and the Special Projects Division.

2.7.2.4 Hiring and Phase I Staff Development

Once selected, any staff members from out of town must be relocated quickly in order to participate in the Phase I Staff Development program. This implies that the Recruitment Team must be aware of contingency factors, such as:

- Housing - location, cost, availability
- Schools - for children of staff members
- Forms - immediate application for health services, etc.
- Transportation - access to the school
- Timing - staff member advised as to best moving time
- Reproduction - of materials needed by staff member

The housing and school problems will be handled by the Recruitment Team, the Interim Education Committee, and the Special Projects Division.

After the hiring has been completed, the Phase I Staff Development program will begin. Some hiring activities will continue, however. The Recruitment Team will have mainly a support function during this phase. A Recruitment Team member should be included in the Phase I Staff Development program, not only to assist in resolving personal problems of staff members, but to stay attuned to possible personnel needs for the present and the future. It is suggested that the Recruitment Team member be allowed to circulate freely during the Staff Development sessions and to be on call if needed. Should a few staff members decide that they do not want to remain at the school, replacements will have to be procured immediately.

2.7.2.5 Resumes

An updated resume file will be maintained by the Personnel Subcommittee of the Interim Education Committee and will be available to the Fort Lincoln School administration. This file, begun by the Recruitment Team and containing summary biographies, will be turned over by the Recruitment Team to the Personnel Subcommittee.

2.8 Staff Development

An educational system has the basic responsibility to protect its clients against incompetence. It also has a higher order responsibility to provide the environment and opportunity for each individual staff member that it has judged competent to realize and maximize his potential contribution to the central task of the system -- instruction. A system is only as good as the people who operate it -- and the people who operate it are often only as good as the system allows.

As used here, staff development refers to all of those activities considered essential to preparing, maintaining, and developing a proficient staff for the Fort Lincoln First Facility.

The importance of staff development in the Fort Lincoln School system can not be overrated. This will be a brand new staff in a brand new school with a brand new program. The theories, structure, and planned objectives of the system differ significantly from the theories, structures, and objectives traditionally implemented in educational facilities throughout the country. At this time, no group of people can be located who are fully trained and prepared to function within this type of system. Also, since the system is designed to remain open to change, adaptation, and experimentation, shifts of roles and responsibilities and the acquisition of new capabilities among the staff will be demanded. The FLNT Staff Development program must begin before school opens (Phase I) and must be maintained as an integral part of school operations (Phase II). Phase I is an intensive two-month orientation, training, and planning period during the summer of 1970. Phase II is an in-service program of activities and opportunities to ensure continuing professional development of the staff.

As in the education program for the students, the basic thrust of the Staff Development program should be to determine and meet the needs and interests of the staff members on an individualized basis. The same knowledge and skills will not be required for every position, and the people hired for the same type of position will vary in knowledge, skills, and experience. As the students begin to respond to the educational program according to their abilities and interests, the instructional staff will discover skill and subject-matter areas in which they need further training. Assistance will be provided to the staff in terms of time and resources so that they can pursue their professional needs, but primary responsibility will lie with each of them for diagnosing and specifying those needs. Like the students, each of the staff members should have a folder containing information and records relating to staff development activities. The first entry in the folder should be the profile of professional strengths and weaknesses which is prepared in consultation with the staff member at the time he is hired. (See Recruitment, Section 2. 6. 3. 1.) This profile should be the first step in facilitating the individualization of the Staff Development program. It should be used in planning, selecting, and devising appropriate learning activities for Phase I, the two-month period prior to the opening of the First Facility and should be continually updated as the staff member participates in program offerings throughout his tenure.

An important fringe benefit of individualizing the Staff Development program should be the development of a staff empathy for and insight into the adjustments and rewards the students themselves will experience under the same method of instruction.

2.8.1 Phase I

An intensive orientation, training, and planning program involving all prospective staff members of the Fort Lincoln First Facility should begin two months before the opening of the school. Experience has shown that without adequate staff preparation the implementation of any new educational technique or program is bound to be unsuccessful. Many of the instructional methods, materials, and equipment in the school will be unfamiliar to many of the staff members. If they are to be used effectively,the staff must be thoroughly skilled and confident in their ability to use them. The staff members will need to become acquainted with the people of the community, the instructional resources offered by the community, and the school/community program that is planned for Fort Lincoln. On the assumption that people are more committed to a program they have participated in designing, many of the educational procedures, school policies, and staff responsibilities have been designed to allow the staff some flexibility in their implementation. Considerable time during Phase I will be required for the staff to become sufficiently acquainted with the school and the program and to make these final planning decisions. Most important, the program and operational design of the school demand that the entire staff discards traditional notions of staff roles and develops new concepts and patterns of behavior in relating to students, parents, and each other. The school community as a whole is expected to become a functioning team with shared responsibilities rather than a series of isolated classrooms and individuals functioning independently. There will be no one person in the Fort Lincoln First Facility responsible for direction and innovation: rather, each participant will be encouraged to assume some share of the responsibility for the program's development.

Phase I of staff development should provide the time, guidance, and support necessary to permit the individuals gathered together to become a team that recognizes individual strengths and weaknesses, shares decisions and responsibility, plans and compromises, and is able to tolerate the confusion, the anxieties, and the uncertainties that may accompany the early operation of the school.

Because every staff member -- secretaries and maintenance people included -- will play an instructional role in the school and because the development of a total team concept and behavior is essential to the Fort Lincoln Education Plan, all adults hired to perform any function related to the operation of the school should attend the two-month session of orientation, training, and planning.

With the addition of alternates and maintenance staff, the number of staff members in the Phase I Staff Development program will be approximately 45.

The 35 eleven and twelve-year-olds selected* to be student helpers in the new school would participate part time in the sessions. Other part-time participants would include parents, volunteers, and tutors from the community education program (see Community Participation Plan).

2.8.1.1 Objectives, Content, and Skills

The overall purpose of Phase I of the Staff Development program is to prepare the staff and auxiliary personnel to implement the school program. The basic objectives of the program should be:

- To provide each trainee with the information and skills he needs to perform effectively as a member of an educational team concerned with the development and implementation of the innovative educational policies and techniques of the Fort Lincoln School.

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* See Recruitment, Section 2.6.2.2

- To develop working relationships which are open, positive, mutually supportive, and non-hierarchical. (This will depend on the development of an accurate perception of strengths, weaknesses, expected contributions, and necessary shifts of attitudes of onesself and one's fellow workers.)
- To involve each trainee in the decision-making process regarding operating conditions and policies to prevail in the school.

The Staff Development Coordinator for the First Facility should function as the training program director. He should assume this responsibility on March 1, beginning the detailed planning of curriculum, methods, and activities appropriate for the personnel hired for the First Facility. A full-time core training staff should start working at least two months before the program begins. The core staff should include a specialist in individualized instruction, an expert in behavioral management in settings similar to the Fort Lincoln School, a group process trainer, and a coordinator to train paraprofessionals, volunteers, and student helpers. The core staff members should not only be experts in their fields but should have extensive experience in training educational personnel. In planning the training program, the core staff should rely upon the specialist resources within the proposed staff to train their peers. For example, the Media

Coordinator should be able to work with the staff on the use of available audiovisual equipment and materials; the reading specialist should be able to explain and demonstrate the use of selected reading curriculum materials to other staff members, etc. Using the behavioral objectives for the various positions and the profiles of the individual staff members as points of departure, the training staff will select or devise appropriate learning activities and criterion tests and contact appropriate consultant staff.

Consultant help will be required for short periods of time to cover specific content or skill needs (e.g., integration of academic games into the curriculum, learning theory, reinforcement psychology, diagnostic technology).

Considering the characteristics of the First Facility education program and the objectives of the preservice program, the content of the Phase I Staff Development program should be focused on the following broad topics:

- The FLNT community and student population -- sociology and economics of the community; achievement and aspirations, particularly in regard to education. (Resources: Definition Phase findings, community speakers, and discussion leaders.)
- Educational philosophy of the Fort Lincoln School System -- discussion of rationale for this kind of school in this setting at this point in time; implications for students, teachers, and parents. (Resources: the planners, the D. C. School System representatives, community spokesmen.)

- The D. C. School System -- discussion of education and the position and relationship of the Fort Lincoln School to the overall system.
- The Washington Teacher's Union contract -- special provisions applying to Fort Lincoln School and rights and obligations of school staff members in the Union.
- Individualized instruction -- overview of history and approaches with special attention to individualized instruction, behavioral objectives, diagnosis and prescription, use of materials.
- Organizational structure and operating procedures -- role and relationship implications of differentiated staffing and use of volunteers and student helpers; need and ways to develop cooperation and respect among people; communication channels; administrative responsibilities and procedures.
- Curriculum -- alternatives, opportunities, implications; emphasis on inquiry and discovery rather than memorization and drill as the approach to learning; matching of objectives and curriculum; special activities and techniques for recognizing and teaching to needs of students with learning deficiencies.
- Resources -- instructional implications of the physical plant; utilization of open flexible space, materials, and

equipment; utilization of nonschool people and institutions from the near and larger community as instructional resources.

- Research and evaluation -- discussion of goals, areas, and techniques of evaluating various aspects of the Fort Lincoln School operation; necessity of continuous adaptation and revision of program based on evaluation.

Within these broad content areas there are certain skills that the staff will need to acquire or develop:

- Ability to cope with feelings about one's own limitations, one's need to be liked, and to be approved by pupils and peers; to deal with feelings of inferiority and insecurity; to deal with feelings of suspicion and fear of pupils, parents, and superiors; to know how one's behavior and verbal communication are affecting others and how to modify both when one desires to.
- Ability to communicate effectively with students, parents, community, and peers.
- Ability to test and diagnose students achievement, behavior, and interests.
- Ability to prescribe appropriate educational activities.
- Ability to create learning environments.
- Ability to evaluate and analyze student and staff performance.
- Ability to handle dispersed administrative responsibilities.

- Ability to use and maintain available hardware.
- Ability to implement, adapt, and develop curriculum.
- Ability to construct simple research design.
- Ability to evaluate one's own performance and to accept evaluation from others (students, peers, community, supervisors).

2.8.1.2 Methods

Throughout the training program the trainees should be grouped in a variety of ways in order to take advantage of program offerings specifically related to individual or group needs. Because all staff people will play instructional roles, because administrative functions will be dispersed and decentralized, and because of the basic team approach in planning, all trainees will at one time or another be involved in a training or planning group with all other trainees. Suggested groups and examples of their activities follow:

- By stage -- discussion of learning characteristics of age range covered by the stage; assignment of responsibilities within the stage.
- By subject matter -- reading specialist explores curriculum alternatives for meeting objectives and demonstrates their use; offers suggestions and recommendations across stages.
- By role -- team leaders and coordinators work together to simulate Operating Team functions.

- By function -- all people involved in record keeping and flow of information related to instruction review and practice procedures.
- Total group -- orientation sessions with planners and community representatives.

At any time these groups may include auxiliary personnel such as volunteers, tutors, and student helpers, as scheduled by the coordinator of their training activities. Paraprofessionals and maintenance staff should have special sessions to plan their activities and to acquire skills they will need to play instructional roles.

Midway into the program the trainees should form task forces by stage, Operating Team, and Administrative Team in order to accomplish specific jobs to be done to begin effective operation of the school on opening day. Examples of tasks to be performed include:

- Allocating equipment and space within the school
- Student and staff scheduling
- Ordering supplementary supplies and equipment
- Revising forms
- Establishing means of reporting to students, parents, community, and other educational institutions.
- Developing approaches and materials for community education programs
- Continuing to index curriculum materials to objectives
- Continuing to write criterion test items for terminal and intermediate objectives.

At this time, stage teams should select stage representatives. The task force portion of the program should provide the staff the opportunity to test the organizational plan of the school, to detect and work out the "bugs" in the plan before school opens, and to begin developing the individual initiative and responsibility encouraged by the organizational plan.

A sample of specific methods which could be used in presenting content and skill are described below.

- It is realistic to expect that a large proportion of the staff for the First Facility will not be residents of the immediate FLNT community. Therefore, it is proposed that all staff boards with families in the FLNT community for about 10 days during the training program in order to begin to develop a sensitive understanding of the community and the student population which will be served by the educational facility. Community council members would assist in arranging for housing (host families would be paid for lodging) and would participate in group discussions which deal with the experiences and reactions of the staff to the community live-in.

  During the program each staff member would be asked to participate in at least one community-learning/investigation activity to be reported back to the group and discussed (for example, interviewing local police officers and community people about perceptions of relationships between police and community, patterns of juvenile offenders, services available to the school).

- Prior to arrival at the training site, each participant will be provided with a set of materials (e.g. the education program plan, description of the school facility, community workshop reports, etc.) to be read. Each trainee will be expected to provide a written summary of questions he has about these materials, conflicts he perceives in them, hang-ups he has about implementing the program, etc. These reports should give direction to the timing and content of presentations by program planners and suggest trainee groupings for discussing issues.
- All staff members should work individually on the package of programmed materials designed by Research for Better Schools to train teachers in individualized instruction (Teaching in IPI published by Appleton-Century-Crofts). Experienced IPI teachers should be on the training staff in order to meet with small groups by stage and subject matter in the practice and application of IPI techniques: testing, diagnosis, prescription, etc. Practice should begin with case studies and proceed to using actual students who will be enrolled in the First Facility. A portion of each day of the training program should include this exercise. Similar activity will have to be arranged

for individualizing instruction in subject matters not covered by IPI.

- A videotape and film bank of student and staff behavior at various stage levels in individualized instruction settings, collected during the planning phase of program, should be available for viewing and analysis by staff members.
- A micro-teaching curriculum made up of the skills needed by various positions in the Fort Lincoln School should be developed. Staff members who need to sharpen or practice these skills should participate in the basic teach-reteach cycle of micro-teaching.
- One week of intensive group process training should be planned early in the program to include all staff members. These sessions should be scheduled periodically throughout the program and should continue during the school year. Techniques that may be used in these sessions include analysis of nonverbal communication, communication theory, games, role playing, exploration of helping relationships, etc. Exercises or techniques should be applied to actual tasks or problems faced by the staff as a group. Videotaping should be used extensively during these sessions.

- In helping the staff to cope with the problems of organizing and using space in the innovative physical plant of the Fort Lincoln School, the training program should include an explanation of the features of the Fort Lincoln School and their instructional implications, the use of 3-dimensional school models for planning and practicing the arrangement of moveable and semipermanent fixtures and furnitures, and of the actual setting up of the school for opening day.
- As part of the task force planning of the Fort Lincoln School, models should be developed to simulate student and staff scheduling and space and resource utilization on the computer. If time-sharing equipment is available, these same simulation models should be used by the participants of the training program as a tool for testing the implications of their choices of staff and student schedules and other operational programs.

In addition, the following recommendations for a successful program should be given careful consideration in planning other elements of the program.

- Schedule activities for optimum use of time. Occasional evening sessions should be included if necessary.
- Begin the training with those experiences that focus on the participants: interpersonal relationships, videotaping, role playing.

- Begin immediately to restructure roles and to show that the modification of traditional roles is not a threat. Establish the principle early that in a team endeavor people contribute that which they do best.
- Plan parties or other social events (picnics, trips, luncheons, outings) which include husbands, wives, children.
- Have the training staff available at all times, willing to help assist with personal problems and see that the program runs smoothly. Careful attention is necessary to keep the program on schedule, to have equipment and materials available when needed, to be sure that the program runs smoothly, and to make sure that pay checks are on time.

2.8.1.3 Sample Training Program Schedule

The "curriculum" of the training program can be classified into four major components.

- Orientation to Education Plan, school facility, organization structure, procedures.
- Individual and group experiential training in skill acquisition and attitudinal development.
- Decision-making sessions on operating conditions, policies, and curriculum implementation.
- Task force preparation and implementation of activities related to opening of school.

For the most part, activities related to each of these components are scheduled simultaneously throughout the 8-week program.

WEEK ONE

- Refine profile of each Fort Lincoln School staff member; catalogue abilities and resources represented.
- Review education program for First Facility.
- Discuss issues participants bring to program in written summary.
- Community orientation; assign community learning/investigation exercises.
- Prepare individual programs for the summer in consultation and cooperation with the Phase I Staff Development program instructors.
- View, analyze, and discuss videotapes and films of student and staff behavior in individualized and innovative school settings.

WEEK TWO

- Explore roles and relationships and interpersonal techniques daily in intensive group sessions.
- Use exercises with behavioral objectives and begin to fit objectives to the instructional materials and instructional plan.
- Instruction and practice in the use of audiovisual equipment in the school.
- Begin community live-in experience (different groups scheduled for 10-day periods throughout the first five weeks of the program).
- Sessions on administrative operations and responsibilities.

WEEK THREE

- Work with programmed materials (IPI package of workbooks) to train teachers and aides; combine with practice sessions supervised by training staff.
- Begin micro-teaching clinic for acquiring specific skills.
- Study and hold seminars in individual subject-matter areas (includes assistants).
- Hold group session with sensitivity trainers (see Week Two).

- Special group seminars for support personnel exploring their relationship to instructional program.
- Consultant session.

WEEK FOUR

- Practice diagnosis, prescription, and evaluation. (all staff)
- Begin diagnostic testing of future students.
- Continue micro-teaching clinic.
- Continue seminars in specific subject-matter areas.
- Define tasks that must be accomplished to prepare for operating program; form task force groups; select team leaders.
- Group session.
- Consultant session.
- Sessions in administrative operations.

WEEK FIVE

- Tour of First Facility.
- Plan use of space in First Facility.
- Practice laying out a carefully prepared instructional environment.
- Continue micro-teaching clinic.
- Learn to use and integrate academic games into curriculum.
- Continue diagnostic testing of future students.
- Continue seminars on specific subject matter.
- Consultant session.

WEEK SIX

- Hold community session: report on and analyze live-in and community investigation activities.
- Task force activities: code and cross index equipment, supplies, instructional materials; order additional equipment and supplies; schedule.

- Continue diagnostic testing.
- Hold conferences with parents of prospective students.
- Role play system.
- Sessions on admistrative operations.
- Simulate parts of the system.
- Group session.
- Consultant session.

WEEK SEVEN

- Dry run school program.
- Continue diagnostic testing.
- Continue task force activities (e.g., begin setting up physical environment of school).
- Discuss research and evaluation activities and techniques.
- Group session.

WEEK EIGHT

- Continue to exercise system.
- Report by evaluation team of Fort Lincoln instructional staff performance during summer program; make recommendations for in-service (Phase II) program.
- Plan for in-service (Phase II) program and continuing teacher evaluation.
- Use time left open as determined by Fort Lincoln staff.
- Continue diagnostic testing.

2.8.1.4 Equipment and Materials

Aside from the special films and materials recommended by the core training staff as effective means of training, the major equipment and supply need of the Phase I Staff Development program is to have a portion of the equipment and materials which will be used in the operation of the First Facility. The staff needs to be trained in the effective use of these items. Accordingly, at the time that General Learning Corporation submits a total equipment and materials list for review, a second list will be submitted specifying the items and quantity needed for use in the Phase I program. General Learning Corporation will also recommend staff development books, films, and magazines for the resource center and for training staff consideration.

Examples of equipment and materials which will be recommended for Phase I include:

- Videotape machines and tapes
- Tape recorders and cassettes
- Overhead projectors
- Language Masters
- Poloroid cameras and film
- Typewriters
- Tachistoscope
- Controlled recorder
- Audio Flash Cards
- Talking Page
- Videotape, film, cassettes
- IPI self-instruction training materials
- IPI mathematics and reading materials for students
- AAAS science program materials
- Special electric typewriter with large print type-face and foot control for use in preschool programs

2.8.1.5 Funding of Phase I

The costs of Phase I of the Staff Development program which appear in Appendix A of the Funding Plan are based on the assumption that the program will be contracted. The figures are estimated on this basis and are subject to change as detailed planning proceeds.

2.8.1.6 Schedule of Performance for Phase I Staff Development

General Learning Corporation submits equipment and supplies list for the Phase I Staff Development program to the Special Projects Division.

Order for equipment and supplies is placed for delivery on or before beginning date of program.

Staff Development Coordinator assumes responsibility as Phase I program director. Begins detailed planning of training staff needs and curriculum and activities. Administrative Assistant begins at the same time.

Full-time core staff for Phase I comes on board and continues detailed planning of program including choosing consultants for special purposes, sequencing and structuring learning experiences, etc.

Staff reviews profiles of personnel hired for First Facility in order to plan appropriate program activities and to pinpoint those special resources within the group to be utilized in a training capacity during the program.

Training staff receives recommended list of pupils to participate in the training program from the Participation Subcommittee of the Interim Education Committee.

If the First Facility is not completed by the start of the Phase I program, a training site must be selected at this time.

Live-in arrangements for staff during the Phase I program should be finalized by training staff and the Interim Education Committee Participation Subcommittee.

Equipment and supplies for training program are received and stored at training site.

Community groups to participate in training programs as discussion leaders should be selected by this date.

Total staff hired for Fort Lincoln Final Facility and community people, volunteers, and tutors begin Phase II Program.

Staff develops outline of suggested in-service (Phase II) activities for staff development based on learning experiences during Phase I.

Phase I program ends.

2.8.2 Phase II

An in-service training program is an integral part of a system which aims to create a total learning environment for staff as well as students. The designation of a full-time Staff Development Coordinator and the delineation of staff development responsibilities in all job descriptions reflect the importance which the FLNT planners attach to the concept that continuous professional development of staff is a vital part of the educational process, bearing direct relationship to the growth and development of the students. The planners recommend that 15 percent of staff time be spent in staff development activities (to include daily planning time as well as specific training activities).

In-service training as it now exists in the educational systems throughout the country serves a variety of purposes. Among the most common are: to compensate for the teacher's deficiencies in his initial teacher training preparation; to advance and update the teacher's grasp of subject matter; and to train the teacher for other aspects of school work (counselor, supervisor, etc.). In-service training has also been handled in a variety of ways. The individual teacher takes courses or advanced degree work on his own; universities or colleges in conjunction with school systems confer credit for practical experience or on-the-job training; school systems build time allowances into their schedules and operations for workshops and institutes and/or set up floating teams of specialists to provide on-the-spot assistance to teachers. In many cases, unfortunately, the preparation of a teacher beyond preservice training is not directed to the improvement of his performance but geared toward increases in salary granted for number of credit hours or degrees. Many of the in-service system programs do not respond to needs expressed by the teachers nor are there resources available to individualize the training.

The Fort Lincoln School in-service training program has an immediate somewhat single-minded purpose of encouraging and structuring in-service training activities with direct relevance to improving the learning environment of the Fort Lincoln School.

The foundation or basis for an effective program to achieve this purpose lies in the nature of the system or organization in which it takes place. Fort Lincoln School planners have created a design for the school in which the authority systems, decision-making processes, lines of communication, and general working climate should be so constructed that individual staff members have the freedom, motivation, resources, and mobility to pursue their personal and professional development. The position of the Staff Development Coordinator has been recommended to provide technical assistance to all staff members in their professional development. In the execution of his responsibilities,he should place primary emphasis on responding to needs of individuals and the system and not to defining himself what those needs ought to be.

The starting point for the in-service Staff Development program should be the recommendations made by all of the staff members at the end of the Phase I program. Having had experience over two months with various techniques of training and with various consultants and each other, they should be in a position to identify the activities and resources which they feel would be valuable for them as individuals or as groups in an in-service program. Each staff member, with the help of the Staff Development Coordinator and/or other members of the Phase I training staff, should be able to update his profile of strengths, weaknesses, and interests used as a basis for the design of the Phase I program. With this type of record available, the Coordinator should be able to develop individual prescriptions of staff development activities as a phase of in-service training. It is recommended that staff development activities require less staff time during the first quarter of the school year than they will later when the staff has been operating the program and has experience on which to base a statement ofneeds.

2.8.2.1 Phase II Activities

At this point in time, however, there are a series of activities or mechanisms which seem worthy of implementation in the Fort Lincoln School in-service program after review and discussion by the staff.

- Group process sessions should continue during the school year with approximately one session every two weeks.
- Once a month each staff member should request a peer(s) evaluation of his performance in a specific aspect of his job responsibilities (e.g., group presentation, diagnosis of student behavior, selection of curriculum materials). Videotape recorders

should also be used for this purpose. Records of the evaluation and recommended action should be shared with the Staff Development Coordinator and used as an indicator by him of group training possibilities.

- At least one-quarter of the year might be devoted to a small research project by each staff member (small groups could work together on one project). The research should be specifically related to the Education Plan. The results would be written up, circulated, used for discussion by all staff members, and perhaps included in system evaluation reports and published in academic journals, etc. Staff members should receive assistance in research design and technique from experts at local colleges and universities.
- During the course of the year each staff member should be responsible for a staff development presentation, exercise, or activity with other staff members.
- The 15 percent of time boundary condition on in-service training should be flexible enough to allow staff members to spend three hours a week, none the next, etc.

- The regular school schedule — 11 months of work, one month vacation, Saturday work — may affect the amount of time available for staff members to work on advanced degrees, attend summer institutes outside of the system, etc. If the schedule inhibits staff pursuit of these opportunities, provisions should be made to allow for short leaves of absence for professional purposes and/or negotiations should be carried out with universities to provide academic credit for on-the-job activities.
- Special consultants should be brought in to teach particular in-service training sessions periodically in response to a specific need. Invitations to such a consultant should include an outline of the reasons for requesting his services and the desired outcomes of his contribution. Each such activity should be immediately evaluated on standard questionnaires and retained in the file by the Staff Development Coordinator.
- The resource center should have a section of staff development materials — books; films; tapes; catalogs of course offerings, institutes, and workshops available, etc. The Staff Development Coordinator should be able to suggest readings or

activities of this nature to individual staff members with group reporting responsibility.

- Activities which are formally part of the operating functions of the school should also be viewed as staff development activities. A group of teachers meeting to discuss curriculum experimentation or development are performing a self-training function. The Staff Development Coordinator should participate in as many of these activities as possible.
- The Staff Development Coordinator in conjunction with interested staff members should develop on-the-job orientation and training programs for new staff members hired by the Fort Lincoln School.

2.9 Evaluation

An important goal of the Fort Lincoln education system is to develop an atmosphere conducive to freedom of thought, movement, and experimentation. A crucial element in providing this kind of atmosphere is the approach used in staff evaluation. The recommendations made in this section regarding staff evaluation are based on the following concepts:

- Evaluation is not a necessary evil; it is a desirable means by which individuals and groups can measure their performance against their goals and take appropriate steps to improve themselves.
- Staff evaluation should be concerned primarily with the relationship that exists between staff behavior and student growth and development.
- Self-evaluation is an integral and essential part of an effective evaluation process.
- Evaluation is best conducted by those who have the most direct relationship with the person being evaluated. Evaluation should never be the sole responsibility of one person. All evaluative judgments of an individual's performance should be shared with him.
- Evaluation should be a continuous process rather than a semi-annual or annual event.

2.9.1 Modes of Evaluation

The organizational plan for the Fort Lincoln School stresses staff rather than line relationships among faculty members. This concept, which demands joint effort and responsibility of all staff members for the total school program, must not be undermined by establishing a traditional evaluation system in which principals, supervisors, and/or master teachers assume positions of power over other staff members.

The performance of staff members in the Fort Lincoln School is of significant interest to students, community, fellow staff members, the system, and the individual staff member himself. Since evaluation is a means whereby a staff member can learn how to improve the quality of his service, all of these parties should participate to some degree in the evaluation of each staff member.

- Students

  The student himself is the only person who is entirely familiar with the teacher's behavior in a variety of teaching-learning situations. He is the only one who knows how well the teacher understands and responds to his felt needs. While a number of variables may influence a student's response to questions concerning the effectiveness of his teacher which may not be directly related to the teacher's effectiveness, this possibility should not be considered an obstacle to involving students in the evaluation process.

- Community

The educational staff is responsible for the education of the children of the community which it serves. The extent of community participation in the planning and implementation of the Fort Lincoln School (see Community Participation Plan) and the role of the parent as described in the Education Plan require that the evaluative function be a natural part of their relationship to the Fort Lincoln school.

- Fellow staff members

Since team relationships are the mode of operation of the Fort Lincoln School, the performance of each individual will have an effect upon the performance of all others in the team. The proper functioning of teams will necessitate a clear understanding in each staff member's mind of the strengths and weaknesses of his peers and of the ways in which he can offer and accept assistance from them. Accordingly, peer evaluation becomes an important part of the evaluation process.

- System

As discussed in the staff development section, a school system has the obligation to protect its clientele from incompetence and to provide opportunities for its staff members to realize and maximize their potential contribution to the central task of the system--instruction. In order to fulfill these responsibilities, the system must engage in the process of evaluation. In Fort Lincoln, the "system" is synonomous with the individuals or groups involved in the operation of the school--students, staff and community--and thus all other modes of evaluation constitute the system's evaluation activities. Within the school, the Staff Development Coordinator will be primarily responsible for monitoring and facilitating the evaluation process since the function of evaluation is so closely linked to the development function. During the Phase I program, the total staff will develop the format and frequency for recording evaluation results that will become part of the staff member's permanent file within the D. C. School System. The FLNT Project Director will officially submit such central office records.

- Individual staff member

  In a system such as Fort Lincoln, which assumes responsibility for the failure of students, it becomes even more incumbent upon staff members to exercise their professionalism by demonstrating a capacity for and an interest in evaluating their own performance in relationship to the development of the individual students and the achievement of the goals of the organization. Self-evaluation should be the common and persistent thread in the entire evaluation process.

2.9.2 Areas of Evaluation

Having established that the basic purpose of staff evaluation is to answer the question "How can we improve ourselves in order to further benefit the students and the community served by the school?", it is important to specify a list of performance areas to be evaluated. An examination of the role descriptions for staff, the overall objectives of the school, and the objectives of the Phase I Staff Development program suggests the following areas of evaluation. (This list should be refined and ordered by the staff itself as it becomes familiar with the philosophy and operations of the school.)

- Ability to diagnose strengths, weaknesses, and interests of individual students.
- Ability to formulate behavioral objectives.
- Ability to prescribe and plan appropriate learning activities.
- Ability to adopt and make use of the flexible, physical environment of the building to suit learning activities.
- Knowledge and use of community resources.
- Ability to assist and accept assistance from other team members.
- Ability to relate effectively with parents.

- Ability to function effectively in flexible, unregulated, and/or ambiguous situations.

2.9.3 Process and Methods

If staff evaluation is to serve truly as a tool for improving the relationship between staff behavior and student growth and development, it is essential that it be an ongoing process throughout the school year rather than a periodic activity. For purposes of discussion, the process can be divided into three phases: initial, continuous, and summary. A variety of techniques and procedures are recommended for use throughout the process: the staff profile (see Recruitment, Section 2.6.3.1 and Staff Development Section 2.8), videotaping, questionnaires, and group discussions.

2.9.3.1 Initial Evaluation

Initial evaluation applies to the evaluative techniques used from the time of staff selection through the Phase I Staff Development program. The first of these techniques is the staff profile which will contain an initial diagnosis of the strengths and weaknesses of the staff member written by the staff member himself and those who observe him during the selection process. Accompanying the profile is a prescription form which outlines activities recommended for the staff member in order to improve his performance. To all of this material which is kept in individual folders, are added the records of evaluative judgments made by any or all of the sources discussed earlier who are involved in staff development activities and performance of everyday responsibilities.

2.9.3.2 Evaluation During the Phase I Staff Development Program

Evaluation of staff performance during the Phase I Staff Development program must be based upon the goals and objectives of the orientation and training program. According to these objectives, staff must develop an understanding of the goals and objectives of the Fort Lincoln Education Plan, become familiar with the types of activities to be carried out by the staff, and develop working relationships based upon an accurate perception of the strengths, weaknesses, and expected contributions of the group participants. The accomplishment of the latter objective is most essential to the successful functioning of the Fort Lincoln School. The following discussion suggests techniques for evaluating its accomplishment.

It has been recommended that the staff members of Fort Lincoln participate in a series of group process training encounters led by well-trained psychologists in order to achieve the objective of developing working relationships. The purposes of these sessions are to enable the participants to:

- Establish for themselves realistic personal goals as well as realistic role definitions.
- Begin to see themselves as members of an innovative, experimental project in education.
- Ascertain their degree of acceptance within the group and pinpoint factors for improvement of their present acceptance pattern.
- Confront the anxieties and fears which they may have concerning their roles in this project and/or the instructional situation itself in order to establish effective guidelines for dealing with them.

- Understand the effect which others have upon the choices which they make for themselves and the types of behavior which they undertake.
- Develop the courage of their own convictions and the ability to follow through with them until change seems warranted.

Because of the nature of these objectives which stem from individual personality development,self-evaluation should be the first step in the process, followed by individual consultations with members of the psychological staff and the development of a set of personal objectives for development in this area. After these personal objectives have been established, a group discussion of the results with a limited form of group evaluation should take place, followed by a reassessment of individual goals and objectives for development.

The psychological staff should develop an instrument for self-evaluation based on these goals and objectives using a format similar to the formats of the Money Problem Check List or the Science Research Associates Junior Inventory. Several items should be developed for each objective. Each item should be designed to help the individual gain a clearer picture of his relationship to the accomplishment of this particular objective. For each statement the respondant would check one of the following boxes:

1. ☐ with major difficulty
2. ☐ with moderate difficulty
3. ☐ with slight difficulty
4. ☐ with difficulty.

The staff member will also be asked questions such as the following:

- At one time or another each one of us has been asked to evaluate ourselves or our own work--perhaps it was while we were still students, while we were student teaching, or in another job situation. How do you feel about evaluating your own work?
- Objectivity is often considered to be an important part of evaluation. In relationship to evaluating yourself, were you able to be objective?
- How do you feel about evaluating the work of others?
- The sessions you have been attending have been designed to give you information about the school system in which you will be working. Do you feel that you need more information in order to understand your role?
- Could you describe your job now?
- Do you feel that you will be able to carry out the duties of this job?

On the basis of the self-evaluation and their relationship with the participants during the training sessions, the psychologists would be expected to write up their impressions of each participant. Then each participant, assuming that he has developed a rapport with (and trust in) the psychologists, would be scheduled for an individual meeting with the psychologists in which they would discuss both their own responses on the questionnaire and the psychologists' impressions of the individual relative to the same questions. As a result of this discussion, the participant would be encouraged to establish goals for himself relative to the overall objectives. For example, a participant's responses may indicate that he does not feel that he has a strong commitment to his own ideas and that he is easily convinced to change his mind on given issues. The psychologist may agree with the participant and point out specific instances in the training sessions in which the participant was easily swayed by the opinions of others. As a result of this discussion, the participant may list as one of his goals for personal development a desire to question himself more closely on his educational philosophy in an effort to develop more concrete ideas or beliefs.

After the conclusion of these individual sessions, further group discussions related to some of the questions which the team of psychologists feels will be beneficial to the group as a whole,may be helpful. If, however, the psychologists feel that there is not enough interaction between group members to allow them to compare themselves with the impressions which others have of them, they may administer another instrument to the group which would call for them to react to other people. Such an instrument might include such questions as:

- Who in this group seems to communicate their ideas most clearly to the rest of the group?
- Who in this group would I turn to if I developed questions and uncertainties about what was expected of me?

After reporting the results of this questionaire to the group, it would be possible to further stimulate discussion as to _why_ and _how_ particular persons seem to express their ideas well, or _why_ group members would turn to particular persons for leadership and encouragement.

Such discussion should be followed by allowing each participant to reevaluate the goals which he has set for himself and encouraging each participant to consider various approaches by which he may more completely accomplish both the overall goals as stated in the program objectives and his own personal goals which he has set for himself.

At this time the Phase I staff should carefully consider the results of the above sessions in relationship to their observations of the participants and the final reports of the psychologists involved in order to determine to what extent sensitivity training sessions for the purpose of role development and self-understanding should be continued during the in-service portion of the school year.

2.9.3.3 Continuous Staff Evaluation

Continuous staff evaluation should focus primarily on the competencies of staff members relative to their instructional roles. The frequency and pattern of evaluation should be determined by the instructional teams themselves, but evaluation should occur at least once a month and should involve use of more than one resource (self, students, community, system, peers) in the process.

For example, an intern teacher may develop and use a self-evaluation instrument such as a checklist for a science experiment, including the following types of questions:

- Did I have all materials on hand before the class began?
- Had I experimented with the demonstration before the class?
- Did I allow for maximum participation by all students involved?
- Was the demonstration or experiment suitable in terms of the number of students involved?

She might also distribute a questionnaire to the students, asking such questions as:

- Was there enough time to ask questions about the experiment before we move on to a different topic?
- Were you able to see clearly the charts that the teacher presented?
- If you wanted to do an extra experiment yourself, do you feel that the teacher would help you to find the materials and plan the experiment or find additional resources related to the topic?

The intern teacher might also videotape the proceedings of the experiment and afterwards analyze the behavior of both the students and herself. As a final step in the evaluation she might view and discuss the tape and the results of the questionnaire with the Master Teacher in the stage, the school's science specialist, or the Staff Development Coordinator for their reactions to her performance. Results of each of these steps should be maintained in the teachers staff development folder.

Other techniques which could be used in continuous staff evaluation include the following:

- Two members of a team may choose to check the reading levels and learning difficulties of a particular group of students. By overlapping the assignments in such a way that a small group of students will be tested by both instructors, a situation will develop in which it will be possible for these two instructors to sit down and compare results for the purpose of evaluating their own skills in the diagnosis of reading difficulties. For difficult problems they may turn to the Master Teacher or reading specialist for assistance in improving their ability to make certain types of diagnoses.

- Each team is responsible as a unit for certain aspects of the instruction of children in their charge. For example, the responsibility for the grouping of all the children at a particular level rests with the entire team in charge of that level. The utilization of available space, materials, and personnel at a particular time is also the responsibility of the entire team. Therefore, it is possible for members of other teams to evaluate the team as a whole with regard to this type of responsibility. In this instance, the evaluation is not directed at one person, but at a team, and as such should encourage a feeling of team pride and team cooperation for improvement.

- Questionnaires* containing questions similar to the following might be filled out by parents each quarter of the year--or at a time that the stage team feels is appropriate--regarding their relationship with an instructional staff member who is working with their child:

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* Further examples of this type of student questionnaire may be found in the New York Study of Teacher Effectiveness report by K. G. Nelson et. al. in Measures of Teaching Effectiveness (University of the State of New York, Albany, 1956).

1. My child's teacher appears to have a real concern for the boy's success in school.

   Yes_____ No_____

2. She tries to explain to me the reasons for my son's performance in each subject area.

   Yes_____ No_____

3. She helps me to understand how I may help him to do well in school.

   Yes_____ No_____

4. She listens and cooperates with me when I have a problem concerning my son's progress or adjustment in school.

   Yes_____ No_____

5. My son's teacher is friendly and helpful.

   Yes_____ No_____

Students may be asked to respond to questions such as the ones listed below.

1. My teacher gives me special help when I am confused about my assignments.

   Yes_____ No_____

2. My teacher has favorites in the classroom.

Yes_____ No_____

An evaluation of the responses of students and parents to such questions can do much to assist the teacher in evaluating her relationship with the parents and her pupils. They will also make it possible to pinpoint problem areas and provide further in-service experiences to remedy situations of poor communication and/or misunderstanding.

In order to obtain worthwhile results from parent and student evaluations it is suggested, however, that all persons involved (parents, students, and educational staff) receive training in this area of evaluation beginning during the Phase I Staff Development program. In order to facilitate this training, it is suggested that a set of videotapes showing various types of interactions between the three groups be prepared. These tapes should include sessions in which instructional staff members are instructing groups of students of various sizes, discussing a student's progress with the student, planning together, discussing a student's progress with his parents, etc. They should also be shown to parents requesting information from teachers, voicing complaints to various staff members, observing classes, and participating in school projects and school planning. Various aspects of student behavior should also be included. Each individual videotape should be brief and basically should be concerned with one particular type of situation. These tapes should be initially shown to groups of parents, groups of students, and groups of teachers at different times. Discussions should be conducted in each group to analyze instructor, parent, and student behavior in terms of its appropriateness, its success in terms of increased communication and understanding,etc. Active participants in these discussions may be selected to form a panel for further discussion of these issues with other groups having similar problems. The purpose of these sessions is to develop in all persons involved the ability to observe and evaluate certain types of behavior in situations similar to the ones in which they will participate together.

2.9.3.4 Summary Staff Evaluation

A summary staff evaluation should be held at the end of each year by teams and appropriate "outsiders" such as the Staff Development Coordinator, a consultant who participated in in-service training sessions, a group process trainer, community representatives, students, etc. In the case of the Operating Team or the Administrative Team,outsiders would include teachers and aides as well as consultants, community, and students. The purpose of the summary evaluation should be to review and discuss the performance of the team and the individuals within the team based on the evaluation activities recorded during the year. Such a process might result in role changes for individuals, reassignment of team responsibilities, or recommendations for career advancement.

2.10 Qualifications and Advancement

Section 2.3 describes a series of differentiated teaching positions which must be filled to begin operation of the Fort Lincoln School. Section 2.6 and 2.7 recommend procedures for recruiting and selecting staff and also provide broad guidelines or criteria for qualifying as a staff member. This chapter treats the topic of qualification in more detail and in relationship to a proposed process whereby staff can advance through the series of positions and/or levels on the basis of acquired experience, demonstrated competence and continuous training.

The term certification has been used sparingly in this report because of the planners' convictions that current certification requirements in the teaching profession are often rigid, irrelevant or misguided and provide little or no proof of true professional competence. They keep out of classrooms as many good teachers as they allow in. Growing public and professional recognition of the inadequacies of current certification systems is attested to by a number of developments in the areas of teacher preparation and certification: for example, the study done by the Massachusetts Advisory Council on Education regarding status, problems, and proposed solutions to teacher certification in that state; the Education Professions Development Act which through the Office of Education grants federal funds to support creative developments in the training of educational personnel; proposed legislation in the State of California to take licensing out of the hands of the education establishment and make it the responsibility of classroom teachers and laymen and to qualify a teaching candidate by calling for a B.A., not necessarily in education,and either the passing of an examination in the subject he wanted to teach or by the fact of having an M.A. in the subject; the Models for Preparation of Elementary School

Teachers prepared by nine different universities under grants from the Office of Education which propose new and innovative ways of preparing teachers and of measuring professional competency in behavioral terms.

GLC's reluctance to endorse meeting certification requirements as an essential qualification for teaching at Fort Lincoln is not intended to imply that many fine teachers are not to be found among the ranks of the certified. It does suggest, however, that the effectiveness of such teachers may bear little relationship to their having accumulated or acquired X number of credits in education courses. At the same time, GLC does not call for the State — the District of Columbia in this case — to abrogate its responsibility to license or certify a teacher in order to protect its students from incompetence. The planners merely join a long line of educational reformists who are calling for a different method or basis for certification, advancement, career development, etc. of teaching staff. The inherent holiness of a B.A. or an M.A. degree is questioned, and we submit that individuals may have work or independent study experiences which have resulted in personal qualifications at least equivalent to those supposedly generated by formal degree programs which prepare people to become teachers of children. It is also believed that those work or study experiences might well be gained while engaged in a real teaching position in a real school and academic or certification credit could be provided for those experiences.

The obvious alternative to certification according to transcript or eligibility for more advanced positions by accumulation of further credits is to develop sets of performance criteria which must be met in order to qualify for positions. The alternative to irrelevant courses gaining credit and acceptance is to have the credit-givers (universities, colleges, institutes) adopt a more liberal attitude toward what activities should earn credit. GLC is recommending a combination of these approaches for the Fort Lincoln System. GLC is not, however, offering a detailed or specified plan for Fort Lincoln qualification and advancement plan for several reasons. The state of the art of preparing performance criteria for teachers is not fully developed and what does exist is not readily adaptable to the staffing concept and plan for the Fort Lincoln system (unlike the tested performance objectives in the Educational Plan which were available for students in the elementary school). More important, all studies and treatments of the subject and certification and advancement of teachers recommend strongly that the teachers themselves in conjunction with school administrators and laymen participate in determining the competency levels required for such plans. It is also highly recommended that such groups continuously assess, review, and adjust criteria because there is little doubt that criteria guidelines may become as rigid and restrictive as course requirements, perpetuating a status quo rather than encouraging the development of new kinds of teachers needed for schools now and in the future. This point is particularly relevant to the Fort Lincoln School System which is designed to be flexible, adaptive, and responsive to changing needs and situations.

Investigation of the alternative of university flexibility in awarding credit or recognition or work and independent study experiences as well as course-taking also indicates that a healthy trend is beginning but is not yet fully developed. The work that has been done in this area has been mainly in relationship to the development of career ladders for paraprofessionals. In the Washington, D. C.

area, Federal City College, D. C. Teachers' College, and the Washington Technical Institute have to date demonstrated the most flexibility and interest in participating in this type of program. As the planning for the implementation of the First Facility at Fort Lincoln gets underway the Special Projects Division and/or the Staff Development Coordinator should begin to negotiate with these and other institutions of higher learning to explore the possibility of granting academic credit to the entire staff at Fort Lincoln for participation in special staff development programs within the system (see Section 2. 8) and for pursuing independent study related to the functioning of the system.

At this point in time GLC offers the following range of educational or experience criteria for qualifying as a candidate for each of the Fort Lincoln staff positions in the First Facility. They reflect the philosophy of the plan and the opening remarks of this section of the report. They deviate somewhat from strict Board of Education and Washington Teachers' Union rules but they do not compromise the educational standards expected to be met by the Fort Lincoln Schools.

TEACHER INTERN

(min.) ● Two years of college plus two years of non-certified teaching experience (e.g., parochial school, Montessori)

- Baccalaureate degree
- M.A.T. degree

(max.) ● Baccalaureate degree; eligibility for certification; no teaching experience except for student teaching

ASSOCIATE TEACHER

- Certified teacher with at least one year of classroom experience and in the process of developing an area of specialization
- Recent graduate of Teacher Corps program
- Two years of college plus five years of teaching in private or parochial school
- Baccalaureate degree with two years of teaching experience in Peace Corps, private or parochial school; participation in special institutes, workshops, etc. concerning an area of specialization
- Baccalaureate degree, education courses, informal teaching experience, five years of professional experience in fields related to teaching (e.g., textbook writing or editing; curriculum development; training program design, street academies)

(Highly desireable for all of above: experience in non-graded schools, team teaching and/or individualized instruction)

MASTER TEACHER

- Certified teacher with five years of teaching experience and credit towards a Master's Degree
- Non-certified teacher with five years of teaching experience, a Master's degree in subject field.
- Baccalaureate degree, three years of teaching experience, three years of teaching experience, three years of professional experience in fields related to teaching (e.g., textbook writing or editing; development of instructional materials; training of educational personnel; school system planning; research work on educational problems)

(All of the above should have the following additional qualifications:)

- Experience in team leadership either in school or private organizations (ability to recognize and use resources of others in an effective and harmonious fashion)
- Competencies in two areas of specialization (e.g., math and science; language arts and remedial reading; social studies and contingency management)
- Knowledge of theories and practices of individualized instruction: diagnosis and prescription; use of performance objectives and criterion test items, etc.)

STAGE ASSISTANT

- High school diploma or equivalent or working toward G. E. D.

SCHOOL ASSISTANT

- Sixth grade reading level

ADMINISTRATIVE COORDINATOR

- B. A., preferably in liberal arts, not necessarily in education or business

(Should also have the following:)

- Experience as an administrative assistant or administrator for "professionals" in places like Federal Aviation Agency, National Institute for Mental Health, Upjohn Company, hospitals, etc., or in social service organizations such as O. E. O., Teacher Corps, Peace Corps, etc.
- Experience with inventory control, purchasing, elimination of red-tape and forms and paper work
- Experience in preparing, assisting in preparing, or accounting for budgets
- Background or experience in PPE - mental organizations

STAFF DEVELOPMENT COORDINATOR

- B. A.; 5 years teaching experience. Graduate study (15 credits plus) or degree in field related to supervision, teaching training, human relations

(Should also have any three of the following:)

- Two years experience as team leader with M. A. T. or Teacher Corps program
- Two years experience as team leader in an open-plan school using team teaching and differentiated staffing patterns
- University liaison between school of education and school system placement, supervision and evaluation of teacher trainees in clinical experiences
- Experience or skill in translating job requirements into educational training requirements
- Experience in designing and implementing teacher training or staff development programs (could be for private educational consulting firms, foundations, U. N., Peace Corps, community-controlled school systems)

- Extensive involvement in, and capability to handle basic and advanced human relations laboratory experiences*

MEDIA COORDINATOR

- A degree in Library Science, specialization through study and/or experience in elementary school level curriculum, audiovisual and printed resources, and characteristics of students

(Experience should include:)

- Previous responsibility for organizing a library or Resource Center for school or community
- Formal training in graphics production and display
- Familiarity with computer applications in library science
- Working knowledge of operation and simple maintenance of audiovisual equipment

RESOURCE COORDINATOR

- High school diploma

(Should also have the following:)

- Experience in community development in Community Action Agency, VISTA, Peace Corps
- Residence in Washington, D. C. for 2 years**
- Service in public schools as an aide, volunteer, or PTA member**
- Experience as a staff member in summer or after school educational programs for children where making contacts with local resources and scheduling were part of job
- Experience as a staff member in a community recreation center
- Experience in operating a program using volunteers (e.g., tutoring, recreation, field trips) where volunteers were received, trained, and assigned tasks.

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* Required qualification

** Required qualification plus one of the others listed

The above qualifications are initial entry requirements into the Fort Lincoln positions. They should assist the recruitment team and selection committee by delineating the pool of applicants to be considered for positions. As stated in the recruitment and selection sections of this report, personal or human characteristics consonant with the philosophy of the Fort Lincoln plan are also to be considered in determining the choice of staff. Section 2.3.5 describes the activities and responsibilities attached to each of the positions, i.e., the areas of competence that staff members should be able to demonstrate. The Phase I Staff Development program attests to the fact that the planners do not expect that all staff hired will be able to function in all of those areas of competency until they have gone through a period of formal training. The activities and responsibilities listed, however, should be a starting point for the development of the performance criteria for staff members' ratings and advancements. The procedure recommended for developing those criteria is to establish a task force charged with the development of the skill levels peculiar to each position, methods of measuring those levels and the combination of requirements which staff must fulfill in order to receive a salary level change or move from an assistant to an intern, an intern to an associate, etc.

The task force should be made up of teachers, assistants, the Staff Development Coordinator, the Fort Lincoln Project Director, a Teachers' Union representative, a D. C. School System representative from Board of Examiners, and consultants from universities. The task force will have to relate to and integrate its procedural recommendation with the staff evaluation (see Section 2.9), and staff development functions (see Section 2.8) of the system. It will have to consider the university-liaison relationships available for offering additional training and bestowing credit, and recognition of experiences in the system. At the end of this section of the report is attached a set of performance criteria developed by the University of Pittsburgh for teachers in an individualized school and an example of the kind of rating which could be applied to performance standards which were developed by the University of Georgia for assistants, teachers, and specialists. Attention must also be paid to defining the terms temporary, probationary, and permanent teacher in the Fort Lincoln context in a manner not only meaningful to the Fort Lincoln operation but also of value to the teacher and to the system for mobility throughout the system should service at Fort Lincoln terminate. The task force should have developed a tentative plan for position qualifications and advancement by the end of the first nine months of operation of Fort Lincoln. The plan should be reviewed and approved or altered by the entire staff, the Board of Education, and the Washington Teachers' Union. Once adopted, the plan should be reviewed annually for its continued relevancy and appropriateness.

EXHIBIT A

Below is the key to the ratings of the Georgia Model Specifications on the following pages.

Cognitive

1 - Knowledge
2 - Comprehension
3 - Application
4 - Analysis
5 - Synthesis
6 - Evaluation

Affective

1 - Receiving
2 - Responding
3 - Valuing
4 - Organization
5 - Characterization

GEORGIA MODEL SPECIFICATIONS*

3.01 *Performance Specifications—Cognitive Processes*

	Characteristic	*Level of Development*					
		Cognitive			Affective		
		Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.01.01	Creativity as problem solving.		3	5		4	5
3.01.02	Conditions where the creative process flourishes.		3	6		2	4
3.01.03	Activities for the development of creativity in pupils.	1	3	5	1	3	4
3.01.04	Development of curiosity.		3	5		3	5
3.01.05	Techniques for discovering relationships (e.g., inquiry training).	1	3	4	1	2	3
3.01.06	Techniques for problem solving.	1	3	5	1	2	3
3.01.07	Application of principles from the disciplines to phenomena.		3	4		2	3
3.01.08	Techniques for predicting cause and effect.		3	4		3	4
3.01.09	Interpreting the results of change.		3	6		3	5
3.01.10	Techniques for observing one's environment.	1	3	4	1	2	3
3.01.11	Techniques for describing one's environment.	1	3	4	1	2	3
3.01.12	Techniques for extracting information from one's environment.	1	3	4	1	2	3
3.01.13	Relationships within the environment.	1	3	4	1	2	3
3.01.14	Measurements and standards.	1	3	4	1	2	3
3.01.15	Techniques for classifying and identifying items in the environment.	1	3	4	1	2	3
3.01.16	Identification of basic types of personality.	1	2	6	1	2	3
3.01.17	Acceptance of basic types of personality.	1	2	4	2	5	5
3.01.18	Development of self-expression.	1	3	4	1	2	3
3.01.19	Development of interpersonal communications.	1	3	6	1	3	4
3.01.20	Pupil feelings, attitudes, and interests.	1	3	6	1	4	5
3.01.21	Techniques for acceptable pupil expression of their feelings.		3	5		4	5

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*This report was performed pursuant to a contract with the Office of Education, U. S. Department of Health, Education, and Welfare.

3.02 *Performance Specifications—Educational Tests and Measurements*

Characteristic		*Level of Development*					
		Cognitive			Affective		
		Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.02.01	Historical background and overview of educational measurement.		1	3		1	3
3.02.02	Purpose for and components of a test guide.		3	6		1	3
3.02.03	Different types of items and teacher made tests.		3	6		1	3
3.02.04	Instructions for and administration of tests.	1	3	6		1	3
3.02.05	Normative data.		3	6			
3.02.06	Interpretation of test scores.	1	3	6		1	3
3.02.07	Desirable test characteristics.		3	6		1	3
3.02.08	Gain experience in finding test information.		3	6		1	3
3.02.09	Standardized intelligence tests.		2	6		1	3
3.02.10	Special aptitude tests.		2	6		1	3
3.02.11	Achievement batteries.		2	6		1	3
3.02.12	Techniques of self-appraisal.		2	6		1	3
3.02.13	Rating methods and construct scales.		1	6		1	3
3.02.14	School testing programs.		1	6		1	3
3.02.15	Methods of reporting student progress.	1	3	6		3	3
3.02.16	Orientation to guidance procedures.		1	3		1	3
3.02.17	Behavioral tests and projective techniques.		1	2		1	3
3.03	*Instructional Improvement and Professional Development*						
3.03.01	Self evaluation procedures to provide individual feedback			3			3
3.03.02	Relationships between teacher behavior, pupil behavior, and learning.			4			3
3.03.03	Dependent and independent variables of the instructional setting.			5			2

Characteristic	*Level of Development*					
	Cognitive			Affective		
	Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.03.04 Dependent and independent variables which influence the instructional performance and professionalism of the teacher.			6			3
3.03.05 Dependent and independent variables which influence the non-instructional behavior of the teacher.			6			3
3.03.06 Role differentiation and the variety of staff utilization possibilities.			2			3
3.03.07 Ability to contribute as a group member in cooperative planning and provide leadership in group situations where necessary.			3			3
3.03.08 Ability to derive testable hypotheses from actual classroom events, problems, or issues.			4			3
3.03.09 Ability to find and utilize resources, persons, and materials in instructional improvement and professional development.			3			3
3.03.10 Ability to communicate effectively with other staff members, administrators, consultants, resource persons, parents, and lay persons.			3			3
3.03.11 Professional organizations and the role of these in instructional improvement and development of the profession.			4			3
3.03.12 Ability to remain tentative in the face of alternative or conflicting data until a logical or empirical conclusion can be reached.			6			4
3.03.13 Observational techniques for assessment of program effects, achievement, pupil behavior, etc.			6			3
3.03.14 Computational and statistical skills for organizing and analyzing data at the classroom level.			4			
3.03.15 Control of instructional behavior (timing, showing enthusiasm, etc.).			3			3
3.03.16 Writing evaluative criteria and instructional objectives in accurate and specific terms.			6			3
3.03.17 Selecting appropriate evaluative techniques and instruments.			6			3
3.03.18 Positive commitment toward life-long learning and systematic improvement as primary requirements for optimum teacher effectiveness and professional development.						5

Characteristic	*Level of Development*					
	Cognitive			Affective		
	Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.03.19 Positive attitude toward self evaluation, self-understanding, and the subsequent modification of instructional behavior.						5
3.03.20 Responsibility to the development of education as a profession outside of classroom or instructional duties.						5
3.03.21 Acceptance of assessment, evaluation, and analysis of instructional performance by others.						4
3.03.22 Openness to suggested alternate instructional behaviors from others.						4
3.03.23 Enthusiasm for new and "innovative" instructional methods and materials.						3
3.03.24 Inquiry into the individual problems of children and the multiple problems of the classroom and instructional setting.						3
3.03.25 Experimentalism with the variables of instruction and the professional role of the teacher.						3
3.04 *Specialized Training Related to Local Conditions*						
3.04.01 Local factors which influence educational conditions in the school, local school district, community, county, and state.			2			3
3.04.02 Cause-effect relationships between local factors and school conditions.			1			2
3.04.03 Ways in which other teachers have approached and solved problems and issues related to local conditions.			1			3
3.04.04 Alternative solutions to problems arising from local conditions.			3			3
3.04.05 Instructional materials designed for special applications.			1			2
3.04.06 Evaluative techniques for assessing the extent of influence which local factors have on school conditions.			3			3
3.04.07 Strategies for effecting change in local factors and conditions which influence school conditions.			3			3
3.04.08 Patterns of action research as a means of local solution of problems.			3			3

Characteristic	*Level of Development*					
	Cognitive			Affective		
	Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.04.09 Social and philosophical factors as they influence local conditions.			5			3
3.04.10 Community resources which apply toward the solution of problems related to local conditions.			3			2
3.04.11 Adaptation of general instructional methods and materials to fit unique organizational patterns.			3			3
3.04.12 Local curriculum guides and materials.			2			2
3.04.13 Research findings which may bear on local school problems and conditions.			2			2
3.04.14 Unique local and state school policies, procedures, and regulations.			2			3
3.04.15 Local school philosophy, goals, and objectives.			2			3
3.04.16 Techniques for evaluating the influence of local factors on school conditions.			6			3
3.04.17 Adaptation of available instructional materials to fit certain local conditions.			3			2
3.04.18 Adaptation of general instructional methods and techniques to fit certain local conditions.			3			2
3.04.19 Investigation of cause-effect relationships between local factors and school conditions.			4			3
3.04.20 Public relations and political activities.			3			3
3.04.21 Operations or action research on classroom or school problems.			3			2
3.04.22 Communication with parents regarding local conditions and school problems.			3			3
3.04.23 Curiosity regarding local factors and their relationship to school conditions.						2
3.04.24 Openness and acceptance for alternative solutions to problems arising from local conditions.						3
3.04.25 Positive attitude toward change where improvement is the likely result.						4

Characteristic	Level of Development Cognitive Teaching Assistant	 Teacher	 Specialist	 Affective Teaching Assistant	 Teacher	 Specialist
3.04.26 Positive attitude toward inquiry and experimentation.						5
3.04.27 Positive attitude toward individual responsibility and initiative.						5
3.04.28 Positive attitude toward political power and public relations as means for changing local conditions.						5
3.05 *Psychology*						
3.05.01 Genealogy of developmental conceptions.		3	6		3	4
3.05.02 Assessment of developmental change.		3	6		3	4
3.05.03 Individuality of development.	1	3	6	2	3	4
3.05.04 Status and progress in organismic development.		3	6			
3.05.05 Complexity of growth of the organism.		3	6			
3.05.06 Use of norms in development.		3	6			
3.05.07 Methods for appraising growth.		3	6			
3.05.08 Maturation and growth.		3	6			
3.05.09 Maturation and experience.		3	6			
3.05.10 Psychomotor development.	1	3	6			
3.05.11 Cognitive development.	1	3	6			
3.05.12 Psychoanalytic theory and cognitive development.		3	6			
3.05.13 Behavioristic theory and cognitive development.		3	6			
3.05.14 Cognitive field theory and cognitive development		3	6			
3.05.15 Social-personal theory and cognitive development.		3	6			
3.05.16 Achieving a sense of self.		3	6	3	3	3
3.05.17 Learned patterns of adaptation for affective development.		3	6	3	3	3
3.05.18 The effect of learning and behavior.		3	6	3	3	3
3.05.19 Language patterns and behavior.		3	6	3	3	3

Characteristic	*Level of Development*					
	Cognitive			Affective		
	Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.05.20 Socioeconomic influence and behavior.		3	6	3	3	3
3.05.21 Family influence and behavior.		3	6	3	3	3
3.05.22 Peer influence and behavior.		3	6	3	3	3
3.05.23 Factors in individual differences (e.g., sex, age, race, physical, intelligence, and experiential background).		3	6	3	3	3
3.05.24 Approaches for studying human development.		2	6			
3.05.25 Associative learning theories of learning (connectionism, conditioning).		3	6			
3.05.26 Reinforcement, instrumental, and operant as components of conditioning.		3	6			
3.05.27 Field or cognitive learning theories (phenomenological, Lewins Vector, Talman's Purposive Behaviorism, Piagetian).		3	6			
3.05.28 Genetic, experiential, transactional, and factorial elements in intellectual development.		3	6	3	3	3
3.05.29 Needs, motivation, motives, experiences, and view of self as determinants of behavior.		3	6	3	3	3
3.05.30 Reward and punishment, success and failure, praise and reproof, competition and cooperation, and individual goal setting as factors in discipline and motivation.		3	6	3	3	3
3.05.31 Retention and transfer of training (remembering, forgetting, overlearning).		3	6			
3.05.32 Problem solving, meaning, and creativity and their development in the classroom.		3	6	3	3	3
3.05.33 Implications of growth, development, and learning to the classroom.		2	6	3	3	3
3.06 *Pedagogy*						
3.06.01 Pupil classroom behavior.	2	5	6	1	3	3
3.06.02 Effect of heredity and environment on pupil development.	1	4	6	1	3	5
3.06.03 Self-evaluation.		4	4		3	5

Characteristic	Level of Development					
	Cognitive			Affective		
	Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.06.04 Techniques for developing pupil self-evaluation.		3	5		3	3
3.06.05 Methods for developing pupils as independent learners.		3	4		3	3
3.06.06 Individual differences in pupils.		4	6		5	5
3.06.07 Influence of communications media on individuals and society.	1	2	4	2	2	3
3.06.08 Planning instructional programs.		3	6		3	3
3.06.09 Techniques of pupil-teacher planning.		3	4		3	3
3.06.10 Organizing and implementing instructional sequences.		4	6		3	4
3.06.11 Early intellectual stimulation.		3	4		2	3
3.06.12 Research on pupil interests.		2	4		2	3
3.06.13 Methods for individualizing instruction.		3	4		3	3
3.06.14 Evaluation of pupils on an individual basis.		3	4		3	3
3.06.15 Group dynamics in the classroom.		3	4		3	3
3.06.16 Classroom interaction processes.		3	4		3	3
3.06.17 Classroom climate.	1	3	6	1	4	4
3.06.18 Directing group discussion.	1	3	4	1	2	2
3.06.19 Problem solving techniques.		3	4		2	2
3.06.20 Social responsibility of the individual in society.	1	3	4	1	3	5
3.06.21 Pupil motivation.	1	3	5	1	3	4
3.06.22 Sociometric techniques.	2	4	6	2	3	5
3.06.23 Decision-making process as it relates to teaching.		3	6		3	3
3.06.24 Respect for the uniqueness of each individual.	1	3	4	2	6	6
3.06.25 Techniques for providing learning experiences that will allow each pupil to meet with more success than failure.	1	3	6	2	3	3
3.06.26 An understanding of self.		4	6		5	5

Characteristic	Level of Development					
	Cognitive			Affective		
	Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.06.27 Techniques for developing pupil self-understanding.		3	4		3	3
3.06.28 Social norms and social behavior.	1	2	4	2	2	3
3.06.29 Current events.	1	2	4	1	3	3
3.06.30 Techniques for incorporating current happenings into the instructional sequence.		3	6		2	3
3.06.31 Criteria for the selection of instructional material.		3	4		2	2
3.06.32 Democratic living in the classroom.	2	3	4	2	3	3
3.06.33 Learning experiences that promote divergent and convergent thinking.		3	4		3	4
3.06.34 Social change and its relationship to the school program.		2	4		2	3
3.06.35 Classroom grouping procedures and techniques.		3	6		3	3
3.06.36 Scope and sequence of the total instructional program (3-12).		2	6		2	2
3.06.37 Preparation of classroom objectives (behavioral).		3	4		2	2
3.06.38 Overall program objectives.		4	6		3	3
3.06.39 Teacher organizations.		2	3		2	2
3.06.40 Teacher rights and legal status.		2	4		2	3
3.06.41 Public school organization and line and staff relationships.		2	4		2	2
3.06.42 Teacher contracts, benefits, and tenure.		2	4		2	2
3.06.43 Grading and promotion practices.		3	4		2	2
3.06.44 Community services available to schools and pupils.		2	4		2	2
3.06.45 Attendance procedures, record keeping, inventories, other reports.		3	4		2	2
3.06.46 Classroom management.		4	6		2	2
3.06.47 Pupil discipline.		4	6		2	2
3.06.48 Parent-teacher and parent-teacher-pupil conference techniques.		3	4		3	3

3.07 *Performance Specifications — Social Sciences*

Characteristic	*Level of Development*					
	Cognitive			Affective		
	Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.07.01 Selection and translation into educational objectives the content of history, geography, sociology, anthropology, economics, and political science.		3	5		2	2
3.07.02 Learning tasks related to the development of social science concepts (time and chronological concepts, spatial and relationship concepts).		3	4			
3.07.03 Appropriate resources for developing social science concepts.	1	1	2			
3.07.04 Observational, written, and other assessment techniques for pupil performance evaluation.		3	3		2	3
3.07.05 Significant historical events.		2	3			
3.07.06 Map, picture, graph, chart, and diagram skills.	1	3	4	1	1	2
3.07.07 Primary source documents for teaching the American political heritage.		3	5		2	2
3.07.08 Methods to teach communism at different conceptual levels.		3	5		2	3
3.07.09 Techniques for teaching controversial issues.		3	5		3	3
3.07.10 Techniques to stimulate interest in current affairs.		3	5		3	4
3.07.11 Types of social problems appropriate for pupil investigation.		3	5		2	3
3.07.12 Concepts and generalizations from the social sciences appropriate for pupil inquiry.		1	1			
3.07.13 Techniques for pupil research (e.g., hypothesis, primary resource materials, verification of data, evaluation).		3	5		2	3
3.07.14 Role of national and state agencies in planning social studies curricula.		1	2			
3.07.15 Interests of elementary pupils relating to the social sciences.		2	3		1	2
3.07.16 Social science topics commonly taught in grades one through seven.		1	5			
3.07.17 Resource units, teaching units, and daily lesson plans.		3	4		1	2

Characteristic	*Level of Development*					
	Cognitive			Affective		
	Teaching Assistant	Teacher	Specialist	Teaching Assistant	Teacher	Specialist
3.07.18 Reading and non-reading learning resources at different conceptual levels.		3	3		2	2
3.07.19 Types and uses of charts, graphs, diagrams, cartoons, maps, and globes.	1	3	3		2	3
3.07.20 Time, space, and relationship concepts appropriate for the pupils' conceptual levels.		3	5		3	4
3.07.21 Techniques for guiding pupils in interpreting and drawing conclusions from data gathered for inquiry.		3	5			
3.07.22 Techniques to guide pupils through teacher-pupil planning process in structuring inquiry.		3	5			
3.07.23 Assessment of pupil progress, toward a maturing space and time sense.		3	6		1	3
3.07.24 Print and non-print teaching resources to implement historical, geographical, sociological, etc. objectives.		3	4			
3.07.25 Techniques to structure classroom situations in which pupils can discover and practice techniques of communication.		3	5			
3.07.26 Information, materials, etc. which provide support for group work.		3	4		2	3
3.07.27 Techniques to structure a classroom in order to provide practice in accepting others.		3	5		3	3
3.07.28 Use of political events as they pertain to teaching objectives.		3	4		1	3
3.07.29 Methods to determine the extent that democratic principles are present in the behavior of pupils.		3	6		2	3
3.07.30 Teacher self-evaluation techniques.		3	6		3	5
3.07.31 Techniques in guiding pupils in the reading process (use of text books, biography, fiction, journals, newspapers, reference sources).		3	5			
3.07.32 Techniques for developing critical reading skills.		3	4			
3.07.33 Dramatic activities appropriate to various units of instruction.		3	5			
3.07.34 Construction activities appropriate to various units of instruction.	2	3	5			

EXHIBIT B

Excerpt From University of Pittsburgh Report

A MODEL OF TEACHER TRAINING FOR THE INDIVIDUALIZATION OF INSTRUCTION*

Minimal Teacher Competencies

A minimal competency means the ability of the teacher trainee to define and demonstrate successfully each specific task or function necessary for teacher certification.

The following nine competency areas are paramount for training teachers to individualize instruction for each child. Behaviors which are not currently within the capability of educators to observe or measure have not been included among these nine areas.

1. SPECIFYING LEARNING GOALS *

Teachers will be prepared to specify learning goals in terms of observable competencies.

The teacher can:

1.01 Identify learning objectives of each type, independently of any one curricular area, or within a given curricular area.

1.02 State learning objectives of each type within each (relevant) curricular area in terms of student behaviors.

The teacher can define:

1.021 Concepts, principles, facts
1.022 Skills
1.023 Inquiry competencies
1.024 Self-direction competencies
1.025 Interests, motives, and values
1.026 Competencies in self-analysis and self-evaluation
1.027 Personal development
1.028 Group process behaviors

1.03 Interpret learning outcomes in terms of acceptable criteria of performance.

1.04 Specify interrelationships among the various types of learning goals.

*Refer to the Appendix for a sample unit on Analyzing a Task or Competency.

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*This report was performed pursuant to a contract with the Office of Education, U. S. Department of Health, Education, and Welfare.

1.05 Specify interrelationships among learning goals from one curricular area to another.

1.06 Translate broad societal aims for schools into relevant learning goals.

1.07 Communicate learning objectives to pupils, teachers, parents, and others.

2. ASSESSING PUPIL ACHIEVEMENT OF LEARNING GOALS

A detailed analysis of the initial capabilities of a learner in a curricular area provides the necessary baseline reference for the coming instruction. The teacher will be skillful in evaluating pupil accomplishments with regard to a variety of learning goals.

The teacher can:

2.01 Demonstrate competency in the use of rating methods, observational methods, interview methods, and situational tests in evaluating pupils' accomplishment of these types of learning goals; inquiry, self-direction, interests and motives, self-analysis and self-evaluation, personal development, cooperative behaviors, and group process.

2.02 Explain the relationships among placement tests, pretests, and posttests of a pupil's achievement in any curricular area.

2.03 Select appropriate placement tests for locating a pupil with a given curricular area.

2.04 Administer and score placement tests.

2.05 Interpret placement test results to locate pupil within a curricular area.

2.06 Identify a pupil's learning difficulties through analysis of test results.

2.07 Involve the pupil in evaluating and interpreting his test result.

2.08 Demonstrate competency in reporting test results to other staff members in numerical, graphic, or verbal form.

3. DIAGNOSING LEARNER CHARACTERISTICS

The state of the learner is a dynamic phenomena. Thus, teachers will need refined observational skills to recognize developing traits, synthesizing techniques to organise existing data, and supporting references to use in developing an improved appraisal of the learner.

The teacher will:

3.01 Appraise the intellectual capacities of the pupil.

3.011 Report a pupil's general intellectual functioning as it is observed in a variety of learning activities.

3.012 Summarize accumulated data pertaining to intellectual capacity, taking account of the pupil's background, developmental level, and reactionto testing.

3.013 Identify appropriate tests which could be used to improve the appraisal of a pupil's general intellectual capacities.

3.02 Appraise the physical condition of the pupil.

3.021 Report a pupil's sensory functioning, motor development, and general health as they are observed in a variety of learning activities.

3.022 Summarize accumulated data pertaining to the pupil's sensory functioning, motor development and general health.

3.023 Identify appropriate sources which could offer additional information to improve the appraisal of a pupil's physical condition.

3.03 Appraise the emotional condition of the pupil.

3.031 Report a pupil's emotional condition as observed in a variety of learning activities.

3.032 Summarize accumulated data pertaining to the pupil's emotional condition.

3.033 Identify other sources and evaluative techniques which could be used to improve the appraisal of a pupil's emotional condition.

3.04 Appraise the social attitudes and behavior of the pupil.

3.041 Report a pupil's social attitudes and behavior as observed in a variety of learning activities.

3.042 Summarize accumulated data pertaining to the pupil's social attitudes and behaviors.

3.043 Identify other sources and evaluative techniques which could be used to improve the appraisal of a pupil's social attitudes and behavior.

3.05 Describe the family and community background of the pupil.

3.06 Develop a summary description of a pupil's learner characteristics acknowledging the relationships among his intellectual, physical, emotional, and social traits.

4. PLANNING LONG-TERM AND SHORT-TERM LEARNING PROGRAMS WITH PUPILS

Individualized learning places new responsibilities on the learner including planning, managing or organizing, directing, and evaluating. However, these endeavors are not pursued alone by the pupil. Rather a new partnership between the pupil and teacher is formed. This is a significant change from the prevalent authority base existent in too many classrooms.

The teacher, too, becomes a learner (i.e. about pupils, about objectives, about hypothesizing conditions.) A new partnership WITH each child will manifest itself in true individualization.

With the pupil, the teacher will:

4.01 Integrate data on his over-all achievements and his learner characteristics into a long-term program that spells out the relative emphasis to be placed on different types of learning goals and on work within different curricular areas.

4.02 Utilize a pretest to specify what learning objectives a pupil will next undertake.

4.03 Utilize data on his characteristics as a learner in selecting the mode and setting and criterion for his individual learning.

4.04 Select materials and equipment that he will employ in the given learning task.

4.05 Select the instructional methods to be employed with his learning task.

4.06 Provide for him to take alternative routes toward the learning objectives.

4.07 Provide for him to employ self-direction in performing the learning task.

4.08 Provide for obtaining data on his performance of the learning task for use in assessing his progress and identifying his difficulties.

4.09 Estimate when he will complete the learning task.

4.10 Plan for interrelating his learning task in one curricular area with concurrent learning tasks in other areas.

4.11 Plan for his group learning situations.

4.12 Determine the means by which the pupil will request assistance or teacher will volunteer help.

5. GUIDING PUPILS IN THEIR LEARNING TASKS

The role of the teacher in an individualized program includes several new dimensions. In a general sense, this image repeatedly illuminates the guidance function of teaching. It is visible when assistance is provided to the pupil who is experiencing difficulty. Other pupils are helped when provisions are made for equipment, materials, special-need groups, and alternative activities. Thus, regardless of the manifestation of this role by teachers, guiding behavior emerges from awareness of individual needs, knowledge of several procedures, and willingness and determination to assist the pupil.

The teacher can:

5.01 Diagnose nature of difficulty.

  5.011 Listen to pupil questions.

  5.012 Probe empathetically.

  5.013 Refer to appropriate records.

  5.014 Consult with colleagues.

5.02 Record the findings of the diagnosis in those situations revealing a significant pupil obstacle or inadequacy of curriculum materials.

5.03 Define the extent to which the pupil has utilized alternative approaches to the learning task.

5.04 Assisting the pupil immediately by examples, questions, prompting, hypothesizing, clarifying, organizing data, etc.

5.05 Provide the pupil with a peer tutor.

5.06 Convene special help groups around specific learning tasks.

5.07 Provide for pupils' working on an independent, pupil-team, or subgroup basis as called for in their individual learning plans.

5.08 Schedule the pupils in the class to provide them with access to the space, equipment, and learning materials they require.

5.09 Make provisions for safety, pupil mobility and volume control.

5.10 Orient pupils to the schedule for the learning plans, to any new materials or media they will be using, and to any guidelines they will be following.

5.11 Provide time for giving pupils posttests as needed, or to plan revised or new assignments for students requiring them.

5.12 Provide alternative activities for those pupils who complete learning tasks without difficulties such as spontaneous fun things using mechanical, artistic, musical, and spatial interests.

6. DIRECTING OFF-TASK PUPIL BEHAVIOR *

The teacher and learner have developed a plan for learning which specifies the environmental components. Behavior of pupils which is not directly related to the learning task and specified environmental components is labeled off-task.

The prospective teacher will need a different orientation to pupil behavior because self-direction is a major outgrowth of individualized approaches. Since this ideal develops in many patterns with pupils, teacher's also will need systematic and analytical approaches toward behavior control.

The teacher can:

6.01 Describe different approaches to behavior control.

6.02 Involve pupils in deciding on acceptable pupil conduct.

6.03 Reinforce acceptable behavior of pupil.

6.04 Identify sources of deviant behavior.

6.05 Intervene appropriately and consistently in cases of deviant behavior.

6.06 Initiate case studies when off-task behavior continually obstructs task completion.

6.07 Determine sources of inter-personal conflicts.

6.08 Assist in the resolution of inter-personal conflicts.

6.09 Distinguish between habitual and temporary deviant behavior and inter-personal conflict.

---

* Refer to the Appendix for a sample unit on this competency.

6.10 Involve pupils periodically in evaluation behavior control procedures.

6.11 Use consultation from colleagues and para-professionals in dealing with behavior direction.

7. EVALUATING THE LEARNER

Movement of pupils through the curricular areas is predicated on the process of evaluation. Pupils encounter each learning task on this basis. Posttest measures are used as the criteria for subsequent decisions regarding long-term and short-term plans.

The teacher can:

7.01 Administer, score, and interpret an appropriate pretest for determining a pupil's next learning task within a curricular area.

7.02 Administer, score, and interpret an appropriate posttest for determining mastery of a given learning task.

7.03 Develop and maintain records regarding pupil achievement, learning characteristic , off-task behavior.

7.04 Initiate depth studies of pupils as obstacles are noted to the successful completion of individual learning plans.

7.05 Organize all data generated by the system of individualization (Comp. 2.00 and 3.00) including both objective and subjective information.

8. EMPLOYING TEAMWORK WITH COLLEAGUES

Effective participation on a team requires specific skills and attitudes. The general concepts of cooperation and leadership are analysed so that specific skills can be developed. Teams also require a continuing concern for the process by which they operate. Thus, evaluative skills are equally important for effective team functioning.

The teacher will:

8.01 Define the organizational patterns of teams active in the operation of the school.

8.02 Define the differentiated roles present on each team active in the operation of the school.

8.03 Participate in team activity by:

8.031 Revealing the way he sees things and does things.

8.032 Bringing out the essential patterns, motives, and behavior in a situation in order to receive back clear and accurate information concerning the relevancy and effectiveness of his behavior.

8.033 Trying out new patterns of thought and behavior in order to experience the process of change.

8.034 Helping colleagues learn how to learn from the process of presentation-experimentation-feedback.

8.04 Evaluate team activity by

8.041 Examining the nature of the discussion to determine the emphasis which is placed on content and process.

8.042 Examining the patterns of communication in the team.

8.043 Examining the decision-making procedures of the team.

8.044 Observing the behavior of the team from the point of view of what its purpose or function seems to be.

8.045 Identifying forces which disturb team work.

8.046 Identifying consulting resources needed by team.

9. ENHANCING DEVELOPMENT

The teacher who recognizes those personal traits which appear to affect her learning process or her skills of interaction with pupils will relate to learners in a new fashion. This personal understanding also leads to an improved mental health status. Such developments represent major new emphasis in the preparation of teachers, and are sometimes reflected in relationships with children.

The teacher can:

9.01 Participate in activities which will help reveal those personal traits which tend to limit his flexibility of behavior.

9.02 Analyze personal strengths and weaknesses which affect professional behavior.

9.03 Analyze values which affect professional behavior.

9.04 Analyze attitudes toward authority, supervision, learning which affect professional behavior.

9.05 Formulate a general plan of self-development to overcome limiting factors.

9.06 Modify personal behavior after interpreting evidence of performance.

9.07 Display self-acceptance by being attentive and responsive to pupils.

9.08 Display empathy and concern for children, including withdrawn, hostile, and non-productive children.

9.09 Display objectivity and rationality in dealing with each pupil's intellectual, personal, and social problems.

9.10 Evidence confidence and emotional control in responding to pressures and problems.

9.11 Demonstrate flexibility in personality by providing for differences to pupil ideas, wishes, actions and feelings.

9.12 Demonstrate flexibility by not becoming uneasy as children mention antisocial or asocial behavior.

9.13 Allow children to vent and express strong personal feelings.

9.14 Display skills for constructive intervention; and non-intervention.

9.15 Avoid wasting children's psychic energy by creating anxiety producing learning situations.

9.16 Listen to and view children's emotional behavior and irrational statements without becoming anxious and disorganized.

9.17 Control expressions of attitudes, feelings and emotional responses, and shifts of tone and voice and gestures.

9.18 Express enthusiasm for knowledge, for instruction, for furthering own learning, and for pupils achievement and interest.

9.19 Exhibit friendly and cooperative behavior in relationship with other members of the school staff and parents.

9.20 Accept the impossibility of effectively relating with every child and adult in every circumstance.

4. REQUIREMENT 4 - GUIDANCE OF TRAINEES

Guidance of trainees' is a faculty responsibility having many diverse patterns. The teacher for tomorrow will need competencies in appraising, and interpreting which will lead to self-development and working with a team of professionals. Some new relationships are required between advisor and advisee, between trainer and trainee, and trainee and program specifications. A higher degree of self direction is required of teachers.

The teacher should have the ability for:

Developing participation skills.

Developing skills of team evaluation.

Acknowledging personal traits which limit flexibility.

Analyzing personal strengths and weaknesses.

Analyzing values and attitudes.

Formulating plans for self-development.

Modifying personal behavior.

Revising long-term and short-term goals.

Planning career goals.

Participating in the counseling-out process.

Participating in program orientation.

Acknowledging program details and adjustments.

Exploring new procedures with state regulating agencies.

Providing new roles in support of the instructional processes.

Providing for clinical faculty development.

CONTRIBUTORS TO THE ADMINISTRATIVE PROCEDURES

Edward Flocco, Chief Consultant

Gale Rose, New York University
Roy Forbes
Gilbert Puente

3. ADMINISTRATIVE PROCEDURES

This section of the report is an operating manual for administration of the educational program to be used by the staff of the Fort Lincoln First Facility. Specifications are detailed regarding information flow, storage, output, time cycles, staffing provisions, authority and responsibility provisions, etc. It is recognized that every conceivable procedure has not been identified and every conceivable need gratified. In fact, some of the procedures may better be addressed when the faculty is brought together during Phase I training. This would include completion of selected sample forms for thorough understanding and identification of required modifications. But it is believed that the elements critical to installing a flexible system are present, and will permit the growth of policies and procedures which will serve the particular needs of the Fort Lincoln Schools.

Several of the administrative subsystems described here will also apply without much change to the comprehensive program. Among these are accounting, budgeting, and personnel records and payroll. It has also been possible to identify areas requiring modification or new procedures when the comprehensive school system becomes a reality. These requirements are addressed in the Comprehensive Plan.

The elements of this manual represent the combined thinking and reactions of many people outside the General Learning Corporation. We are particularly indebted to the members of the central administrative office of the D. C. Schools who assisted in the development of the manual. Staff of the Special Projects Division and local school administrators served effectively in providing guidance and reactions to drafts.

Recently, there have been substantial improvements in the centralized purchasing, budgeting, and accounting operations of the D. C. Schools as they apply to local school administration. As a result, the design work of General Learning was made easier because of the direct incorporation of some of these new procedures into those developed for the Fort Lincoln Schools.

The user will note that there are many forms in this document entitled "Public Schools of the District of Columbia." These have been incorporated directly into the manual because of their appropriateness. The forms in the Accounting and Procurement discussions reflect designs of General Learning, and were developed to be compatible with the central operations of the D. C. Schools after appropriate suggestions and review by personnel of the D. C. Schools.

It was paramount in our design efforts that an operable system be developed. We are grateful for the guidance of the groups mentioned above in seeing to it that this effort resulted in a realistic approach to a management scheme for a semi-autonomous school system.

3.1 Student Registration

3.1.1 Introduction

Information regarding the composition of the First Facility student body should be known as early as possible in order to plan efficient start-up activities. For example, a student body distribution radically different from that projected throughout this plan for each of the stages may require adjustments in the distribution of staff members and their competencies. Or, data gathered during registration on the distribution of student vacations may show that some of the early assumptions concerning this factor and its effect upon student loading and staff requirements were not well founded. An identification of the student body prior to the beginning of the preservice program will certainly be necessary to develop daily procedures. Therefore, the procedures and forms for Student Registration should be prepared so that the actual registration process can begin in April of the Spring preceding the opening of school and be completed by mid-May.

The following major requirements provide a useful outline for developing procedures, and are based upon the assumption that the First Facility will open in the Fall of a given year.

- Target area students are identified - the beginning of the Spring semester prior to the opening of school
- Special Projects completes identification of target population students for the First Facility - mid-April
- Special Projects contacts the parents of the identified First Facility target population to inform them of the educational design of the First Facility - end of April

- Special Projects starts registration of First Facility students - end of April
- Special Projects completes registration procedures and identifies 700 First Facility students - mid-May

3.1.2 Registration Process

3.1.2.1 Identification of Target Area Students

Since the housing facilities for Fort Lincoln New Town will not be complete at the time that the First Facility opens, students will come to school from other areas in the District. The target population may be defined as all of the students within certain census tracts, as identified in the GLC Definition Report, within age groupings which satisfy the stage level distribution defined in the Education Plan. The population could be composed of children from some selected areas and some volunteers, or it may in fact consist exclusively of volunteers. In any case, decisions regarding the entire student population for the FLNT First Facility must be made by the D. C. Board of Education prior to beginning the registration process. The result of this decision will be an identification of the census areas from which students will be reassigned from their present schools to the FLNT schools, and/or from which students will be invited to volunteer for the First Facility. Another alternative would be to accept volunteers on a first come, first served basis within the age grouping.

3.1.2.1.1 Identification of Census Areas

If the Board of Education decides that students for the First Facility will either be required to attend from specific census areas or be allowed to volunteer from those areas, parents of these children must be notified as soon as possible. At the time of notification, these parents must be assured that there are no foreseeable plans to redistrict their children again once they have begun in FLNT schools.

After the policy decision is made by the D. C. Board, Special Projects must study the statistics to determine how close the composition of the anticipated student body will be to that for which the plans were developed. Adjustments may then be made in the census areas from which the students will come or in faculty assignments. The numbers of students within each age group will be known from a study of the population of the census areas.

3.1.2.1.2 Volunteers

It will be more difficult to assess the initial composition of the student body by early Spring prior to the opening of school if the students are largely volunteers. In this case, Special Projects will complete an initial survey of the potential volunteer population to determine the maximum number of students that can be expected within each of the stages. If the number exceeds the projected distribution, then procedures must be developed to decide among the volunteers. One possible procedure is to operate on a first come, first served basis, which may not be satisfactory to some residents in the community.

In any event, Special Projects must proceed within the policy guidelines established by the Board of Education, so that the census areas from which the population will come, either selected or volunteer, will be identified by April 20.

3.1.2.2 Contacting Parents

After the target populations have been identified, Special Projects must be prepared to send them a description of the nature of the First Facility

Program. This description would not be as detailed as that found in the Parents' Handbook, but would discuss philosophy, objectives, opportunities, and expectations. The purpose would be to provide parents and children with a basis for deciding whether to enroll in the Fort Lincoln School. In addition, it may prove worthwhile to have one or more public presentations to discuss the nature of the Fort Lincoln School. At such meetings one of the newer operational elements of the Fort Lincoln Schools should be presented -- the matter of open selection of vacation time. This information will provide parents with a basis for planning family activities, and must be completed by the end of April in order that registration can begin on time.

3.1.2.3 Registration

3.1.2.3.1 Information to Parents

After parents are contacted, Special Projects will begin registration by sending the following information to the parents of all potential students:

- Dates and location of registration activities
- Requirements of students entering school for the first time (Stage 1 and Stage 2)
- Opportunities for free lunch

This information must be mailed so that registration can be completed by mid-May prior to the opening of school.

3.1.2.3.2 Procedures

When the parent comes to school he will complete form 611, School Entry and Information Report (Figure 3-1) and form 612, Application for Free Lunch (Figure 3-2). Even though a child may be transferred from another school in D. C., the parent will complete form 611. At the same time, the parent will be asked to indicate vacation preference for the first year. The forms will be completed at the time of registration, and the data will be compiled by the Fort Lincoln New Town Educational Project Director. To complete these procedures satisfactorily, the parent must bring the record of successful vaccination and the birth certificate to school at the time of registration.

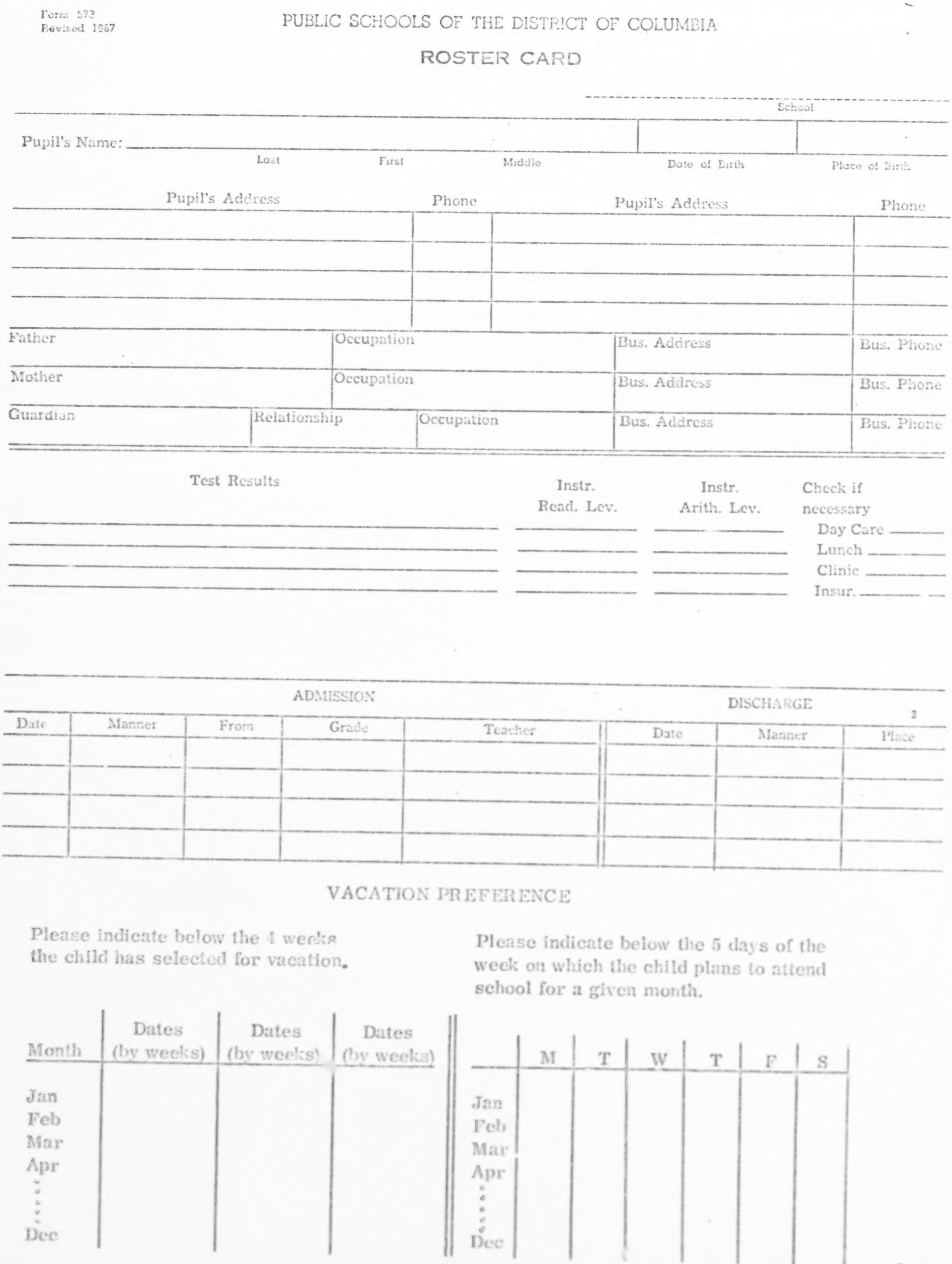
Form 216, Transfer of Pupils (Figure 3-3), will then be completed by the sending schools, and copies of the individual records of students will be requested from these schools. Information identifying transfer students will come from form 611, or from any additional forms which may be designed.

When all information has been collected, a roster card (Figure 3-4, form 573) must be completed for each student, and Special Projects must prepare the information for use in Phase I of the training program. A modification to the existing roster card will permit the recording of information regarding student selection of vacation time and the days of the week he will attend school. This information can then be used to provide a basis for the presentation of data discussed in 3.1.3.

3.1.3 Information Display

The registration process will be designed so that information gained at that time may be used by staff members to acquaint themselves with student data: age, family background, previous school records, etc. Also, as mentioned earlier, data compiled in the late spring regarding age distribution can be used as an early warning device for adjusting the distribution of staff members as well as support services, such as transportation.

Initially, displays of data regarding distribution of students across stages would be useful. The following are examples of these displays:



Form 573
Revised 1967

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

ROSTER CARD

School

Pupil's Name: Last First Middle | Date of Birth | Place of Birth

Pupil's Address	Phone	Pupil's Address	Phone

Father	Occupation	Bus. Address	Bus. Phone
Mother	Occupation	Bus. Address	Bus. Phone

Guardian	Relationship	Occupation	Bus. Address	Bus. Phone

Test Results	Instr. Read. Lev.	Instr. Arith. Lev.	Check if necessary
			Day Care
			Lunch
			Clinic
			Insur.

ADMISSION					DISCHARGE		
Date	Manner	From	Grade	Teacher	Date	Manner	Place

VACATION PREFERENCE

Please indicate below the 4 weeks the child has selected for vacation.

Month	Dates (by weeks)	Dates (by weeks)	Dates (by weeks)
Jan			
Feb			
Mar			
Apr			
.			
.			
.			
Dec			

Please indicate below the 5 days of the week on which the child plans to attend school for a given month.

	M	T	W	T	F	S
Jan						
Feb						
Mar						
Apr						
.						
.						
.						
Dec						

Figure 3-4
3-8

- A head count of all students within each stage, compared with the anticipated number for each stage. This information would be used primarily by SPD and staff in modifying recruitment or assignments.

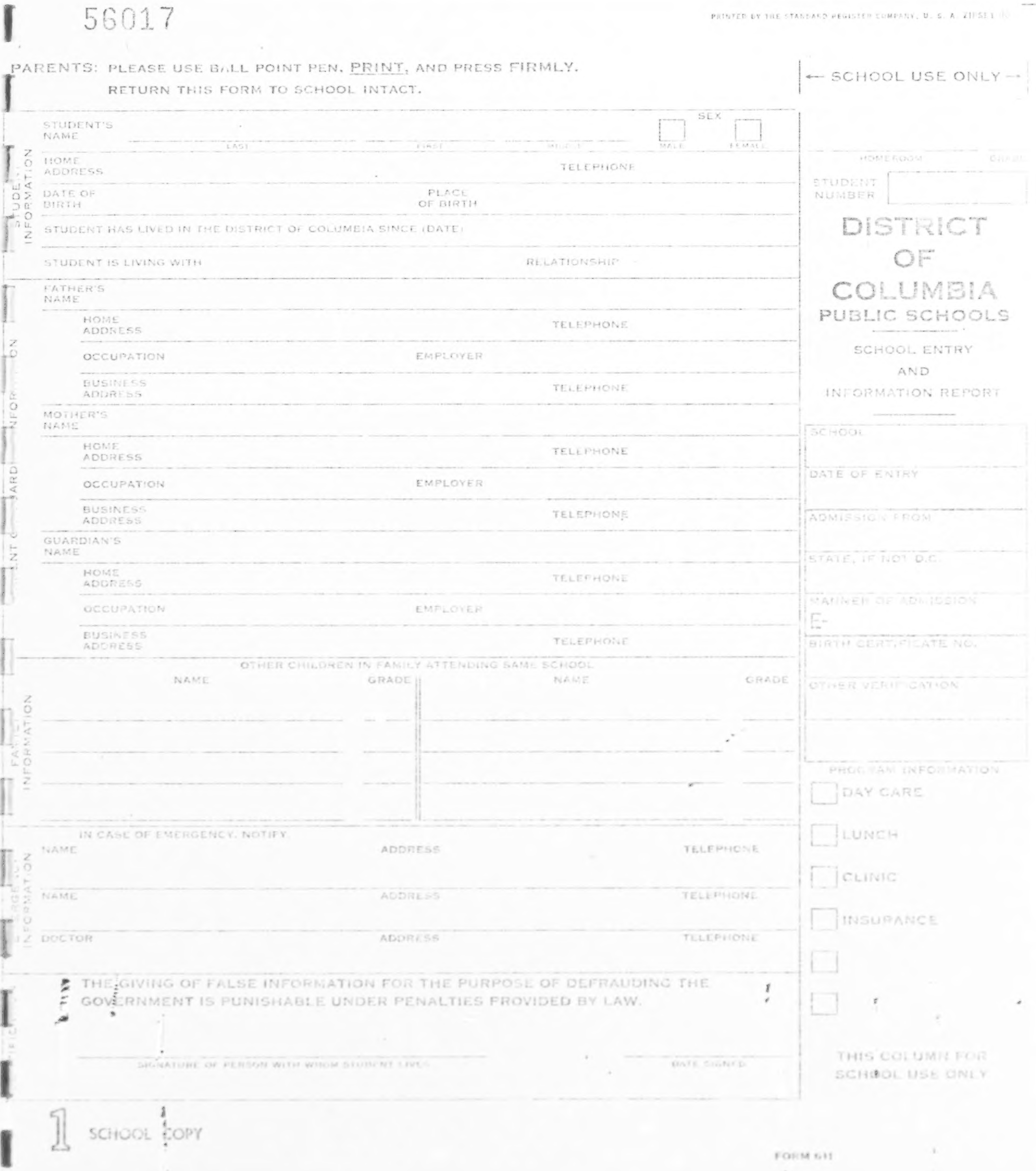
	Stage I		Stage 2		Stage 3				Total
Age Groups	3-5		5-7		7-9 :		9-12		
Anticipated									
Registration									
	Boys	Girls	B	G	B	G	B	G	

- By utilizing information taken from the vacation request, the following display will indicate the extent to which assumptions regarding student loading were reliable, and will provide a framework for establishing staff vacations. The display is developed by subtracting the numbers of students requesting vacation during a given month from the total number of students registered. This display would be used primarily by staff.

Month	J	F	M	A	M	J	J	A	S	O	N	D
Actual Student Loading												
Projected Loading												

- Initially, it will be useful to ask parents to anticipate student use of the facility on Saturdays so that a projection may be made for at least the first month of school regarding the daily loading of students. As operations begin, more detailed records should be maintained regarding the number of students appearing daily for instruction and other activities.

- For food service planning, information should be displayed regarding the numbers of students in each stage requiring free lunch. This information would be used in negotiating and planning with the food service supervisor.
- Information about the number of students in Stage I can be used for planning and negotiating with the transportation supervisor.



56017

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PARENTS: PLEASE USE BALL POINT PEN, PRINT, AND PRESS FIRMLY.
RETURN THIS FORM TO SCHOOL INTACT.

← SCHOOL USE ONLY →

STUDENT'S NAME ______ LAST ______ FIRST ______ MIDDLE — SEX ☐ MALE ☐ FEMALE

HOME ADDRESS — TELEPHONE

DATE OF BIRTH — PLACE OF BIRTH

STUDENT HAS LIVED IN THE DISTRICT OF COLUMBIA SINCE (DATE)

STUDENT IS LIVING WITH — RELATIONSHIP

FATHER'S NAME

HOME ADDRESS — TELEPHONE

OCCUPATION — EMPLOYER

BUSINESS ADDRESS — TELEPHONE

MOTHER'S NAME

HOME ADDRESS — TELEPHONE

OCCUPATION — EMPLOYER

BUSINESS ADDRESS — TELEPHONE

GUARDIAN'S NAME

HOME ADDRESS — TELEPHONE

OCCUPATION — EMPLOYER

BUSINESS ADDRESS — TELEPHONE

OTHER CHILDREN IN FAMILY ATTENDING SAME SCHOOL

NAME	GRADE	NAME	GRADE

IN CASE OF EMERGENCY, NOTIFY

NAME — ADDRESS — TELEPHONE

NAME — ADDRESS — TELEPHONE

DOCTOR — ADDRESS — TELEPHONE

THE GIVING OF FALSE INFORMATION FOR THE PURPOSE OF DEFRAUDING THE GOVERNMENT IS PUNISHABLE UNDER PENALTIES PROVIDED BY LAW.

SIGNATURE OF PERSON WITH WHOM STUDENT LIVES — DATE SIGNED

HOMEROOM — GRADE

STUDENT NUMBER

DISTRICT
OF
COLUMBIA
PUBLIC SCHOOLS

SCHOOL ENTRY
AND
INFORMATION REPORT

SCHOOL

DATE OF ENTRY

ADMISSION FROM

STATE, IF NOT D.C.

MANNER OF ADMISSION
E-

BIRTH CERTIFICATE NO.

OTHER VERIFICATION

PROGRAM INFORMATION

☐ DAY CARE

☐ LUNCH

☐ CLINIC

☐ INSURANCE

☐

☐

THIS COLUMN FOR SCHOOL USE ONLY

1 SCHOOL COPY

FORM 611

Figure 3-1

Form - 612
Revised
1961

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
APPLICATION FOR FREE LUNCH

(NAME OF SCHOOL)

1 Application is hereby made for free school lunches for

(Names of Children Attending Above School)

as I am unable to provide lunches because

2. Names of Persons in Household (Please Print). List "Head" of Household first.

	Last Name	First Name	Middle Initial	Age
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Address

(Street and Number)

(Telephone Number))

(Apartment Number)

	Weekly	Every Two Weeks	Monthly
3. Total Income of Household	$	$	$
Amount received from salary or wages	$	$	$
Names of Wage Earners:			
Amount received from Public Assistance	$	$	$
Amount received from Unemployment Comp.	$	$	$
Amount received from Social Security	$	$	$
Amount received from other sources	$	$	$

Name Sources:

Name Sources:

(over)

W-3

Figure 3-2

APPLICANT'S CERTIFICATION

I declare that the above information is entirely correct with the full knowledge that should any of these statements be found false the needy lunch for which this application is made may be suspended. I further understand that I must report all subsequent changes in family status, occupation, or salary to the School Principal. Failure to report such changes may also result in suspension of this privilege. I hereby authorize any verification deemed necessary to substantiate the information submitted.

I submitted an application for free lunch last year .... yes ☐ no ☐
(please indicate)

....
(Date) (Signature of Parent or Guardian)

Principal's certification of need for free lunch and statement of reasons, other than economic, of child's need. Please note names of agencies working with child or family.

....
....
....
....
....
....
....
....
....
....

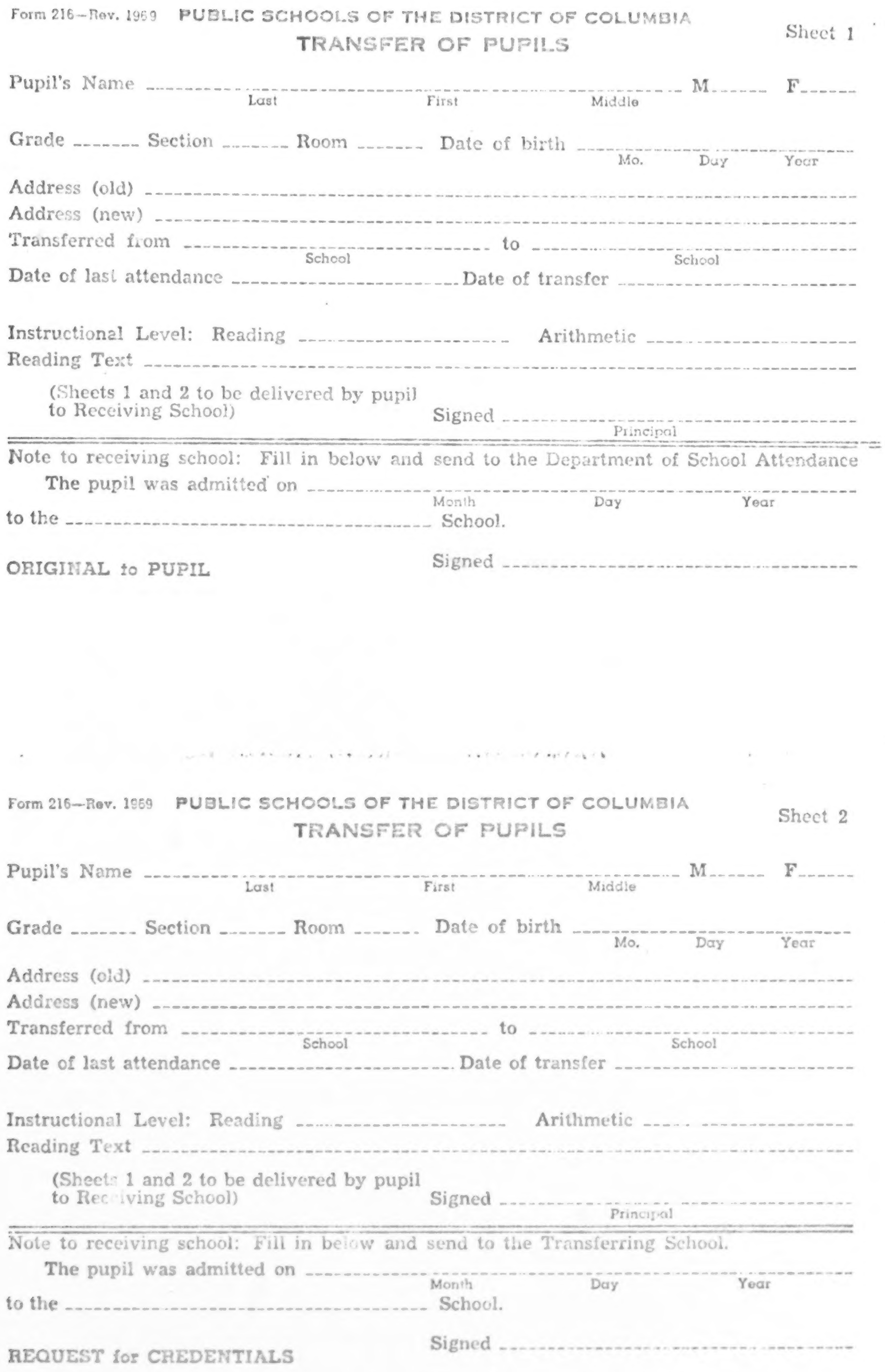
Approved ☐ Disapproved ☐

....
(Date) (Signature of Principal)

W-3

....
(Address of School)

Figure 3-2 cont.



Form 216—Rev. 1959 **PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA** Sheet 1

TRANSFER OF PUPILS

Pupil's Name ______________________________ M_____ F_____
Last First Middle

Grade ______ Section ______ Room ______ Date of birth ______________
Mo. Day Year

Address (old) ______________________________

Address (new) ______________________________

Transferred from ______________ to ______________
School School

Date of last attendance ______________ Date of transfer ______________

Instructional Level: Reading ______________ Arithmetic ______________

Reading Text ______________________________

(Sheets 1 and 2 to be delivered by pupil
to Receiving School)

Signed ______________
Principal

Note to receiving school: Fill in below and send to the Department of School Attendance

The pupil was admitted on ______________
Month Day Year

to the ______________ School.

ORIGINAL to PUPIL

Signed ______________

Form 216—Rev. 1959 **PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA** Sheet 2

TRANSFER OF PUPILS

Pupil's Name ______________________________ M_____ F_____
Last First Middle

Grade ______ Section ______ Room ______ Date of birth ______________
Mo. Day Year

Address (old) ______________________________

Address (new) ______________________________

Transferred from ______________ to ______________
School School

Date of last attendance ______________ Date of transfer ______________

Instructional Level: Reading ______________ Arithmetic ______________

Reading Text ______________________________

(Sheets 1 and 2 to be delivered by pupil
to Receiving School)

Signed ______________
Principal

Note to receiving school: Fill in below and send to the Transferring School.

The pupil was admitted on ______________
Month Day Year

to the ______________ School.

REQUEST for CREDENTIALS

Signed ______________

Figure 3-3

Form 216—Rev. 1969 PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA Sheet 3

TRANSFER OF PUPILS

Pupil's Name ______________________________ M_____ F_____
Last First Middle

Grade _______ Section _______ Room _______ Date of birth ____________________
Mo. Day Year

Address (old) ______________________________

Address (new) ______________________________

Transferred from ____________________ to ____________________
School School

Date of last attendance ____________________ Date of transfer ____________________

Instructional Level: Reading ____________________ Arithmetic ____________________

Reading Text ______________________________

Signed ______________________________
Principal

Sheet 3 to be sent by Transferring School
To ATTENDANCE DEPARTMENT

Form 216—Rev. 1969 PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA Sheet 4

TRANSFER OF PUPILS

Pupil's Name ______________________________ M_____ F_____
Last First Middle

Grade _______ Section _______ Room _______ Date of birth ____________________
Mo. Day Year

Address (old) ______________________________

Address (new) ______________________________

Transferred from ____________________ to ____________________
School School

Date of last attendance ____________________ Date of transfer ____________________

Instructional Level: Reading ____________________ Arithmetic ____________________

Reading Text ______________________________

Signed ______________________________
Principal

Sheet 4 to be
RETAINED by PRINCIPAL of Transferring
School W-8

Figure 3-3 cont.

3.2 Student Attendance

3.2.1 Introduction

Attendance record keeping will be complicated by several factors: relatively free movement of students throughout the school; activity and attendance options; an irregular day and school week; and legal requirements for control, responsibility, and information. The objective of the procedures described in this section is to provide a system which will require a minimum amount of record keeping by students and paraprofessionals.

The implications for safely moving students throughout the facility and activity and attendance options will be discussed in Section 3.3, Student Safety, Security, and Supervision. In this section, the minimum requirements for attendance and record keeping will be identified and procedural requirements and responsibilities will be specified.

3.2.2 Attendance Requirements and Record Keeping

3.2.2.1 Requirements for Minimum Attendance

In summary, the Rules of the Board of Education[1] require the following attendance patterns:

- Section 14, paragraph 1

  All D. C. residents between the ages of seven and sixteen shall be required to attend school on a regular basis, be it private or public schools.

- Section 14, paragraph 2

  Any child between the ages of fourteen and sixteen who has completed the eighth grade course of study or its equivalent may be excused by the Superintendent of Schools from further attendance if he is actually, lawfully, and regularly employed.

---

[1] Rules for the Public Schools of the District of Columbia. Publication authorized by the Board of Education, January 15, 1969.

- Section 14, paragraph 4

  An accurate daily record of attendance shall be kept on all students. Students are expected to attend school for a minimum of 180 days per year.

It is recommended that the student attendance requirements and central record keeping in the Fort Lincoln Schools be the same at those for the D. C. Schools. However, even though there are no minimum attendance requirements for any students in Stage I (ages 3-5) and for very few Stage II students (ages 5-7), it is recommended that the attendance procedures described here apply to all students in order to generate student loading reports.

3.2.2.2 Record Keeping Forms

Forms which will permit teachers to analyze the attendance patterns of students in their stages will be designed during the implementation phase. These forms will be designed to permit the central administration to analyze the overall attendance patterns and to make whatever adjustments are suggested in building or staff utilization.

Forms generating information which will permit monitoring and evaluating attendance procedures will be adapted from the following information and related forms required by the D. C. Schools:

- Daily attendance records of individual students (Form 565, Figure 3-5)

- Monthly absence of individual students within each building, to be submitted to the D. C. Schools (Form 59, Figure 3-6)
- Membership information for individual buildings, to be submitted to the D. C. Schools as requested (Form 19, Figure 3-7)
- Monthly pupil enrollment, to be submitted to the D. C. Schools. (Figure 3-8)

The existing forms might be modified to satisfy both current D. C. and Fort Lincoln School needs.

The entire attendance record keeping operation will be the responsibility of one of the Fort Lincoln central office clerk-typists. She will monitor those reports that are completed and submitted to the school office periodically, collate data, and generate reports internally to staff and to the Department of Pupil Personnel Services and Statistical Office of the D. C. Schools.

3.2.3 Procedures and Responsibilities

The framework within which attendance will be recorded is described on pages 3-193 to 3-200 of this report. Basically, the attendance record keeping will be dependent on having student folders in particular places at different times in the school day and on teacher assistants who will record attendance information.

The attendance procedures are described below:

- After a student schedule is developed, and with each subsequent change, a copy of the Expected Attendance Schedule (see this report, Operations, p. 3-200) will be filed in the student's permanent folder, stage folder, and subject area folders.

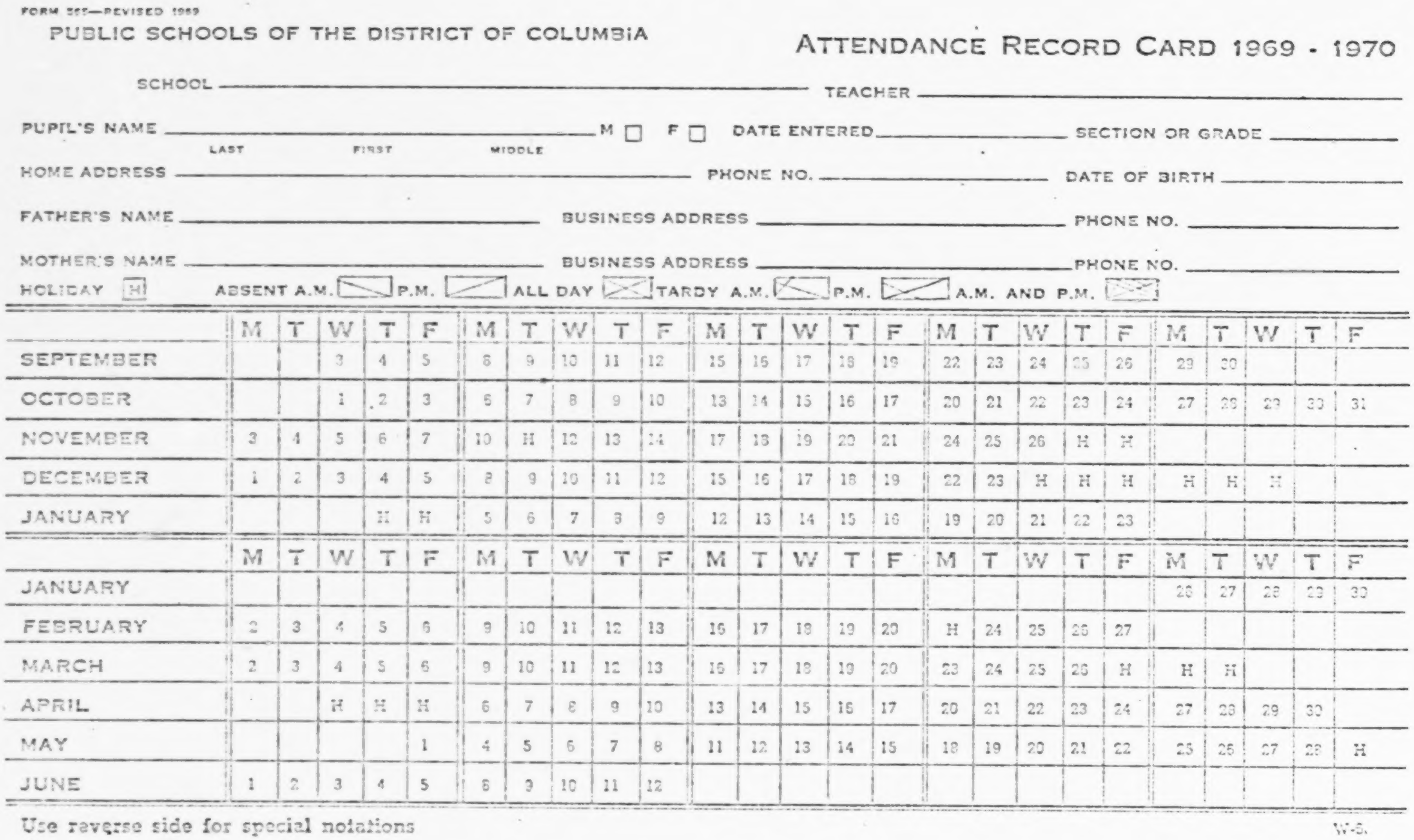
- Student stage folders will be filed on a weekly basis (or as frequently as staff determines) according to expected arrival time of students. A periodic check of the file during the day will indicate those students whose folders have not been removed and who may not have arrived at school according to schedule. Within 15 minutes after expected arrival, a teacher assistant will notify the central office that a student has not appeared at school. The extent of the follow-up must be determined by staff during Phase I of the training program.

  At the end of the student day a check of the stage folders will indicate the extent to which students have completed their expected schedule.

- In addition to the daily recording of student attendance, there will also be a need to have intermediate attendance monitoring throughout the day in order to control and safeguard student movement and to ascertain the extent to which students are adhering to commitments.

  Intermediate attendance can be monitored by identifying an individual in each subject area in each stage who will notify the Stage Representative of any deviations from the expected attendance schedules. The Stage Representative will conduct the necessary follow-up, as determined during the Phase I training program.

Two special student attendance forms, Letter to Parent or Guardian (Form 20, Figure 3-9) and Absence Investigation Request (Form 57, Figure 3-10) have been provided which may be useful in further specifying procedures.



FORM [illegible]—REVISED 1969
PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

ATTENDANCE RECORD CARD 1969 - 1970

SCHOOL ____________ TEACHER ____________

PUPIL'S NAME ____________ (LAST FIRST MIDDLE) M ☐ F ☐ DATE ENTERED ____________ SECTION OR GRADE ____________

HOME ADDRESS ____________ PHONE NO. ____________ DATE OF BIRTH ____________

FATHER'S NAME ____________ BUSINESS ADDRESS ____________ PHONE NO. ____________

MOTHER'S NAME ____________ BUSINESS ADDRESS ____________ PHONE NO. ____________

HOLIDAY H ABSENT A.M. ⧅ P.M. ⧄ ALL DAY ☒ TARDY A.M. ⧅ P.M. ⧄ A.M. AND P.M. ☒

	M	T	W	T	F	M	T	W	T	F	M	T	W	T	F	M	T	W	T	F	M	T	W	T	F
SEPTEMBER			3	4	5	8	9	10	11	12	15	16	17	18	19	22	23	24	25	26	29	30			
OCTOBER			1	2	3	6	7	8	9	10	13	14	15	16	17	20	21	22	23	24	27	28	29	30	31
NOVEMBER	3	4	5	6	7	10	H	12	13	14	17	18	19	20	21	24	25	26	H	H					
DECEMBER	1	2	3	4	5	8	9	10	11	12	15	16	17	18	19	22	23	H	H	H	H	H	H		
JANUARY				H	H	5	6	7	8	9	12	13	14	15	16	19	20	21	22	23					
	M	T	W	T	F	M	T	W	T	F	M	T	W	T	F	M	T	W	T	F	M	T	W	T	F
JANUARY																					26	27	28	29	30
FEBRUARY	2	3	4	5	6	9	10	11	12	13	16	17	18	19	20	H	24	25	26	27					
MARCH	2	3	4	5	6	9	10	11	12	13	16	17	18	19	20	23	24	25	26	H	H	H			
APRIL			H	H	H	6	7	8	9	10	13	14	15	16	17	20	21	22	23	24	27	28	29	30	
MAY					1	4	5	6	7	8	11	12	13	14	15	18	19	20	21	22	25	26	27	28	H
JUNE	1	2	3	4	5	8	9	10	11	12															

Use reverse side for special notations

W-8.

Figure 3-5

HOLIDAYS

Veterans' Day—November 11, 1969
Thanksgiving Holiday—November 27 - 28, 1969
Christmas Holiday—December 24 - December 31, 1969, inclusive
New Year's Day—January 1 - 2, 1970
George Washington's Birthday—February 23, 1970
Easter Holiday—March 27 - April 3, 1970, inclusive
Memorial Day—May 29, 1970

SPECIAL NOTATIONS

(Example: Excused, 10:30 for, etc.)

Month	Notation

Figure 3-5 cont.

Form No. 59 (Revised 1963)

Due on the 6th of each month.

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

DEPARTMENT OF ATTENDANCE AND WORK PERMITS

REPORT OF ABSENCES FOR THE MONTH ENDING ____________

From ____________ School. ____________ Principal.

No.	CHILD'S FULL NAME Surname	 First	ADDRESS	Sex	Age	Grade	DATES OF ABSENCE *	CAUSE OF ABSENCE **
Ex.	DOE	JOHN	111 MAIN ST., N.W.	M	10	5	9/17a, 19, 21p, 25p—28	PERSONAL ILLNESS ***
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								

SEE REVERSE SIDE FOR FOOTNOTE.

USE REVERSE SIDE FOR ADDITIONAL NAMES

Figure 3-6

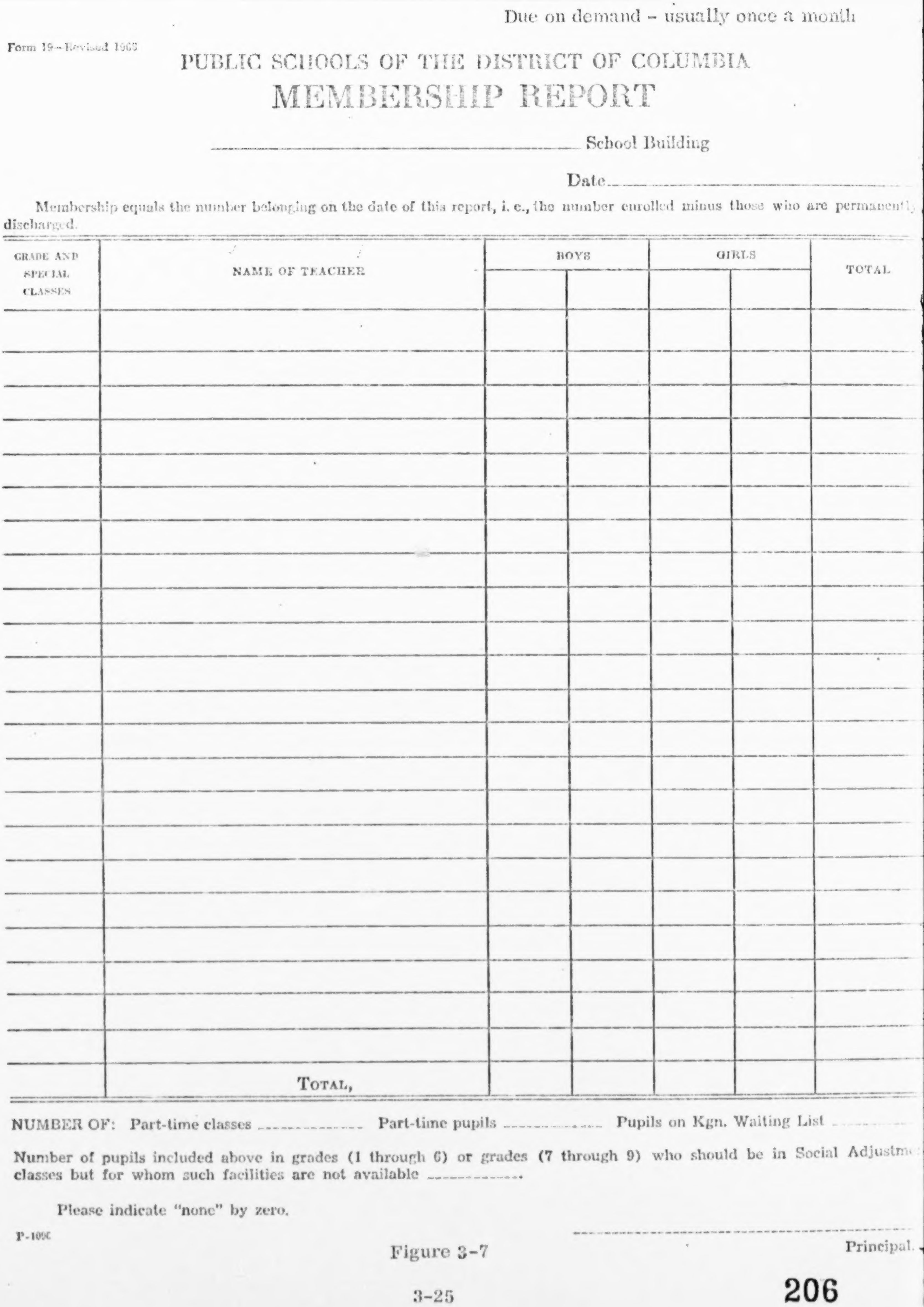
No.	CHILD'S FULL NAME		ADDRESS	Sex	Age	Grade	DATES OF ABSENCE	CAUSE OF ABSENCE
	Surname	First						
26								
27								
28								
29								
30								
31								
32								
33								
34								
35								
36								
37								
38								
39								
40								
41								
42								
43								
44								
45								
46								
47								
48								
49								
50								

* List the names of all pupils, ages 7 to 16, with a total absence of 4 sessions or more. See reverse side "Dates of Absence." Use the exponent "a" (A.M.) if absent only in the morning session of a day. (Example: 9, 17a). Use the exponent "p" (P.M.) if absent only in the afternoon session of a day. (Example: 21p or 25p through 28).

** Form 57, Absence Investigation, to be sent for Truancy and/or Questionable absences.

*** List causes respectively in accordance with dates listed. (Personal illness, Death in family, Out of city, etc.).

Figure 3-6 cont.



Due on demand - usually once a month

Form 19—Revised 1963

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

MEMBERSHIP REPORT

______________________________ School Building

Date____________________________

Membership equals the number belonging on the date of this report, i. e., the number enrolled minus those who are permanentl discharged.

GRADE AND SPECIAL CLASSES	NAME OF TEACHER	BOYS		GIRLS		TOTAL
	TOTAL,					

NUMBER OF: Part-time classes __________ Part-time pupils __________ Pupils on Kgn. Waiting List __________

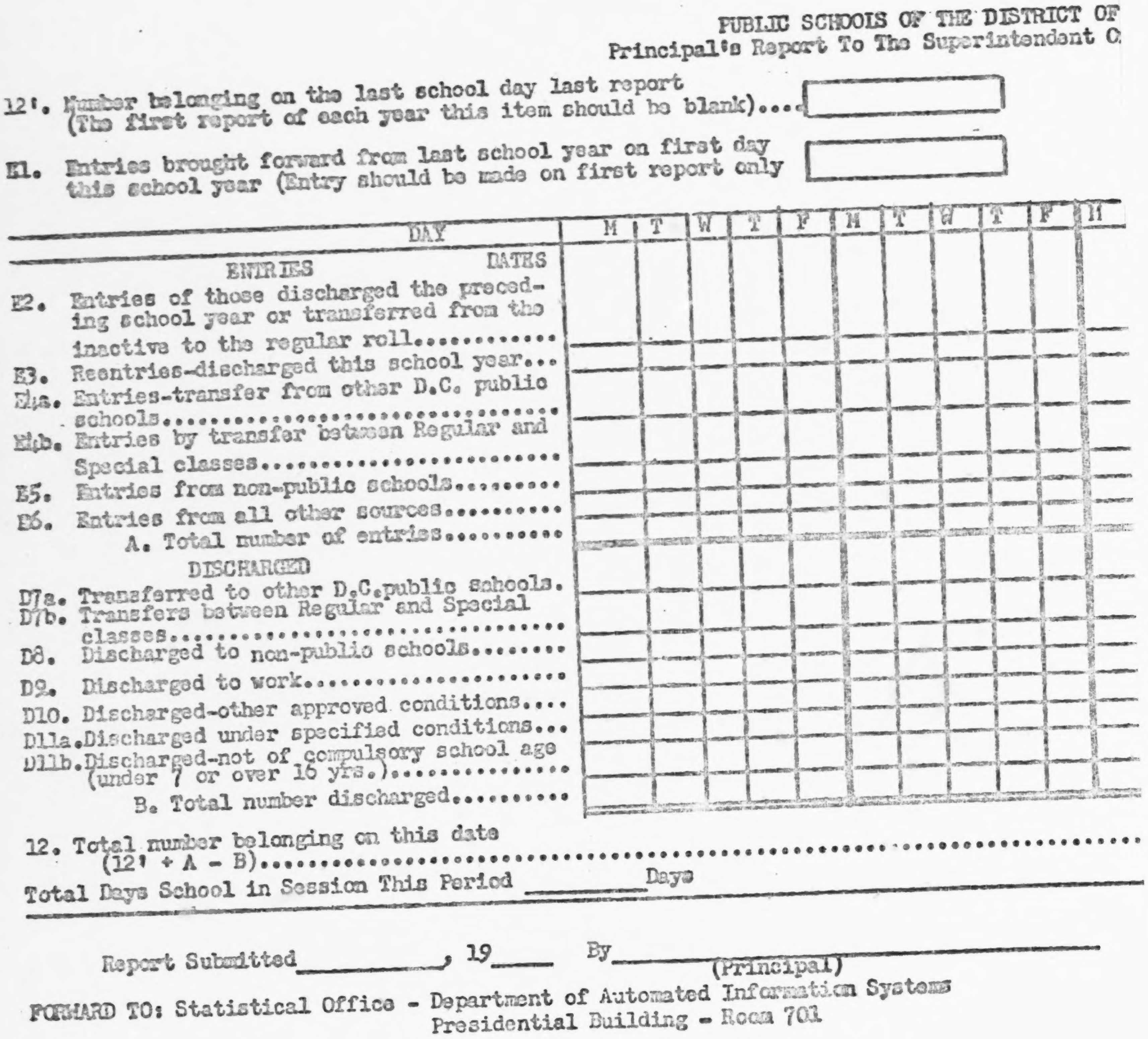
Number of pupils included above in grades (1 through 6) or grades (7 through 9) who should be in Social Adjustm classes but for whom such facilities are not available __________.

Please indicate "none" by zero.

P-1090

____
Principal.

Figure 3-7



PUBLIC SCHOOLS OF THE DISTRICT OF
Principal's Report To The Superintendent O

12'. Number belonging on the last school day last report (The first report of each year this item should be blank).... ☐

E1. Entries brought forward from last school year on first day this school year (Entry should be made on first report only ☐

DAY	M	T	W	T	F	M	T	W	T	F	M
ENTRIES DATES											
E2. Entries of those discharged the preceding school year or transferred from the inactive to the regular roll............											
E3. Reentries-discharged this school year...											
E4a. Entries-transfer from other D.C. public schools..............................											
E4b. Entries by transfer between Regular and Special classes.........................											
E5. Entries from non-public schools..........											
E6. Entries from all other sources..........											
A. Total number of entries..........											
DISCHARGED											
D7a. Transferred to other D.C.public schools.											
D7b. Transfers between Regular and Special classes..................................											
D8. Discharged to non-public schools........											
D9. Discharged to work......................											
D10. Discharged-other approved conditions....											
D11a. Discharged under specified conditions...											
D11b. Discharged-not of compulsory school age (under 7 or over 16 yrs.)...............											
B. Total number discharged..........											

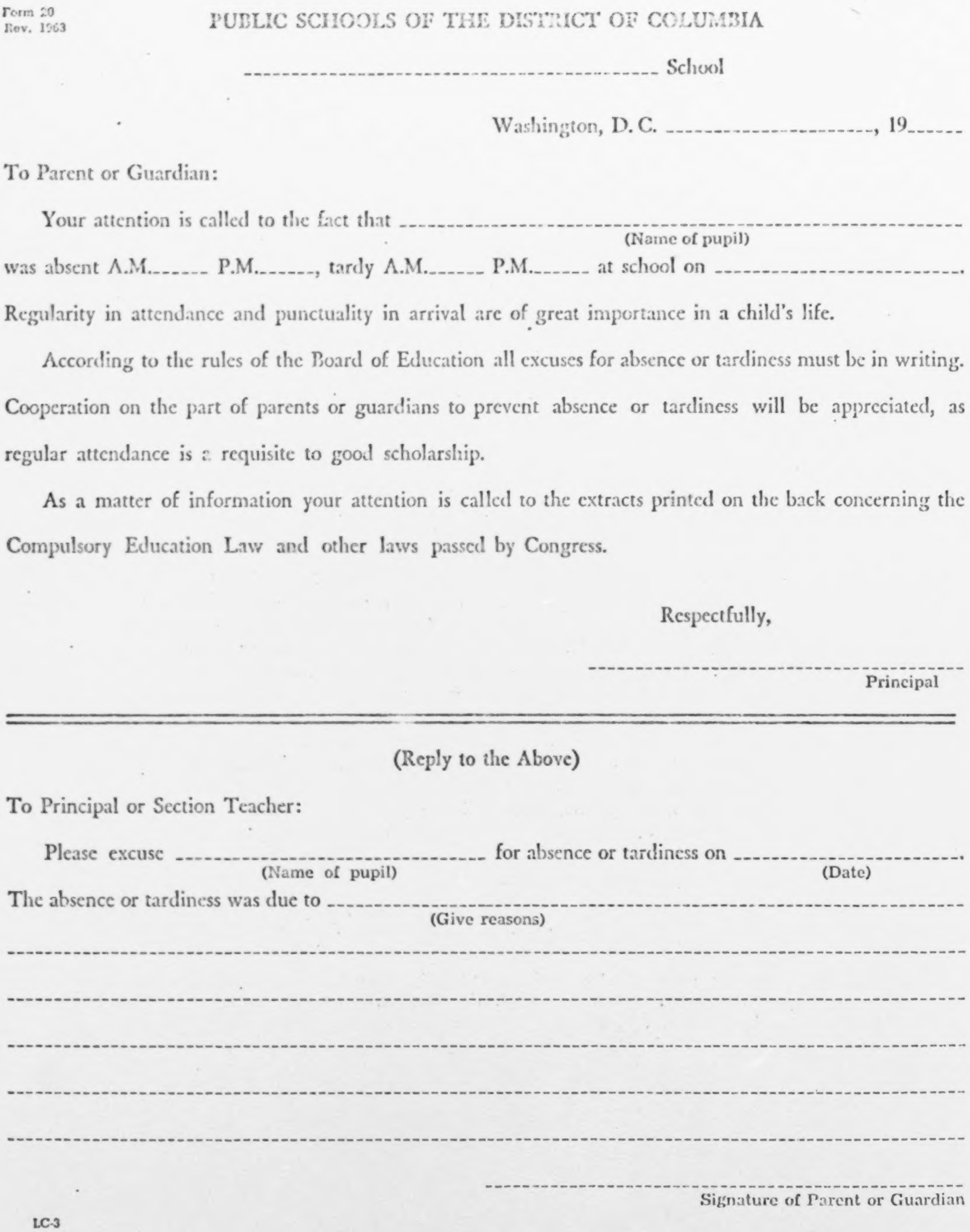
12. Total number belonging on this date (12' + A - B)...

Total Days School in Session This Period ________ Days

Report Submitted __________, 19____ By ______________________
(Principal)

FORWARD TO: Statistical Office - Department of Automated Information Systems
Presidential Building - Room 701

Figure 3-8



Form 20
Rev. 1963

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

________________________ School

Washington, D. C. ________________, 19____

To Parent or Guardian:

Your attention is called to the fact that ________________________________
(Name of pupil)
was absent A.M.______ P.M.______, tardy A.M.______ P.M.______ at school on ________________.

Regularity in attendance and punctuality in arrival are of great importance in a child's life.

According to the rules of the Board of Education all excuses for absence or tardiness must be in writing. Cooperation on the part of parents or guardians to prevent absence or tardiness will be appreciated, as regular attendance is a requisite to good scholarship.

As a matter of information your attention is called to the extracts printed on the back concerning the Compulsory Education Law and other laws passed by Congress.

Respectfully,

____
Principal

(Reply to the Above)

To Principal or Section Teacher:

Please excuse ________________________ for absence or tardiness on ________________.
(Name of pupil) (Date)

The absence or tardiness was due to ________________________________
(Give reasons)

____

____

____

____

____

____
Signature of Parent or Guardian

LC-3

Figure 3-9

SECTION 1. Every parent, guardian, or other person residing permanently or temporarily in the District of Columbia who has custody or control of a child between the ages of seven and sixteen years shall cause said child to be regularly instructed in a public school or in a private or parochial school or instructed privately during the period of each year in which the public schools of the District of Columbia are in session: *Provided*, That instruction given in such private or parochial school, or privately, is deemed equivalent by the Board of Education to the instruction given in the public schools.

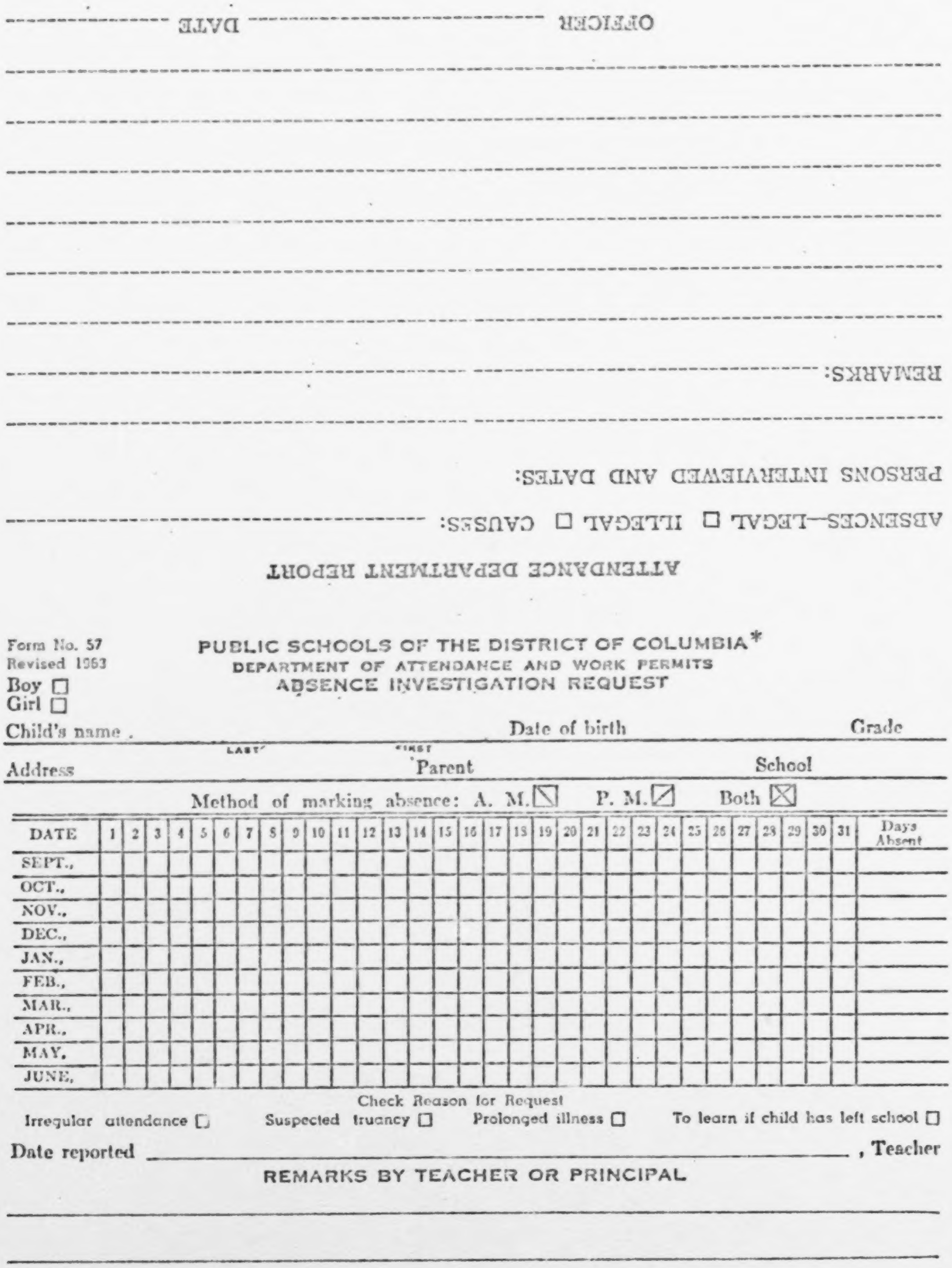
SEC. 2. Any child between the ages of fourteen and sixteen years who has completed satisfactorily the eighth-grade course of study prescribed for the public elementary schools of the District of Columbia, or a course of study deemed by the Board of Education equivalent thereto, may be excused by the superintendent of schools from further attendance at school under the provisions of this Act, provided he is actually, lawfully, and regularly employed.

SEC. 7. The parent, guardian, or other person residing permanently or temporarily in the District of Columbia and having charge or control of any child between the ages of seven and sixteen years who is unlawfully absent from public or private school or private instruction shall be guilty of a misdemeanor, and upon conviction of failure to keep such child regularly in public or private school or to cause it to be regularly instructed in private, shall be punished by a fine of $10 or by commitment to jail for five days, or by both, at the discretion of the court: *Provided*, That each two days such child remains away from school unlawfully shall constitute a separate offense: *Provided further*, That upon conviction of the first offense, sentence may, upon payment of costs, be suspended and the defendant placed on probation.

Because Congress makes its yearly appropriation of funds to our public school system on the basis of average daily membership, it is of paramount importance that pupils be regular in attendance. It is not only a duty but an obligation of the parent or guardian to see that the child attends school regularly.

LC-3

Figure 3-9 cont.



Form No. 57
Revised 1963

Boy ☐
Girl ☐

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA*
DEPARTMENT OF ATTENDANCE AND WORK PERMITS
ABSENCE INVESTIGATION REQUEST

Child's name . ______ LAST ______ FIRST ______ Date of birth ______ Grade ______

Address ______ Parent ______ School ______

Method of marking absence: A. M. ⧅ P. M. ⧄ Both ☒

DATE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Days Absent
SEPT.,																																
OCT.,																																
NOV.,																																
DEC.,																																
JAN.,																																
FEB.,																																
MAR.,																																
APR.,																																
MAY,																																
JUNE,																																

Check Reason for Request

Irregular attendance ☐ Suspected truancy ☐ Prolonged illness ☐ To learn if child has left school ☐

Date reported ______________________________ , Teacher

REMARKS BY TEACHER OR PRINCIPAL

____

____

ATTENDANCE DEPARTMENT REPORT

ABSENCES—LEGAL ☐ ILLEGAL ☐ CAUSES: ______________________________

PERSONS INTERVIEWED AND DATES:

____

REMARKS: ______________________________

____

____

____

____

____

____

OFFICER ______________________________ DATE ______________

* To be used when a child is absent three or more days without proper notification to the school.

Figure 3-10

3.3 Student Safety, Security, and Supervision

3.3.1 Introduction

It will be more difficult to monitor the whereabouts of students, especially in Stages I and II, in the Fort Lincoln First Facility than in conventional schools because of their freedom to use special areas and a physical environment which encourages exploration. There will be variations in safety procedures across stages to meet the needs of students of different age groups.

Detailed procedures required for supervising the facility and those who use it can be determined effectively after the program is in operation. It will suffice at this point to state the minimum staffing and control requirements for the First Facility, so that this information may be reviewed by all appropriate personnel prior to its distribution to staff in Phase I of the training program.

The general philosophy of the staff should be one of total concern by all adults for the well being of all students in the building. This means that clerical and custodial staff, older children, and community volunteers, as well as the professional staff, will assume the responsibility for the welfare of all students.

The procedural guidelines discussed below will address three principal areas:

- Constraints
- Monitoring Techniques
- Administrative Responsibility

3.3.2 Procedural Guidelines

3.3.2.1 Constraints

The Washington Teachers' Union contract details the personnel who may be utilized to provide for student welfare:

- The use of teacher aides as substitutes in case of teacher absence will usually be avoided, but graduate students from local universities can assume this role.[2]
- To ensure pupil safety, the teacher must supervise students 1) on the playground, 2) in the halls, 3) on staircases, and 4) in the lunch area. In this supervision, teachers may be assisted by teacher aides and school assistants when available.[3]
- Non-teaching duties for teachers are to be eliminated as soon as possible.[4]
- Because of the accessibility of certain areas and the encouragement of free student movement, special efforts must be made to see that special areas of the facility, such as the swimming pool, roofs, and boiler rooms are open to access only when a responsible adult is at the location.[5]

3.3.2.2 Monitoring Techniques

Closed-circuit television will be used and particular personnel will be designated to secure personal welfare.

---

[2] Agreement between the Board of Education of the District of Columbia and the Washington Teachers' Union, January 1969 - June 1971.

[3] Ibid. p. 20.

[4] Ibid. p. 45.

[5] Ibid. pp. 44-46. Also lists these duties.

3.3.2.2.1 Closed-Circuit Television (CCTV)

The Facilities Plan (see Midterm Report, Volume III, pp. 5-29 to 5-31) specifies the use of CCTV in the instructional program. In addition, CCTV can be used to monitor movement around the exterior of the facility, at entrance and exit points, and in certain interior areas. CCTV should not be viewed as a "big brother" device, but as a method of detecting intruders and dangers which may cause accidents.

The CCTV system will then be monitored at both the central administrative complex and at the central resource center. The concern will be for unguarded activity of small children, unsupervised activity in special areas, and unusual movement outside the building. Provisions must be made for immediate personal attention to behavior pattern deviations.

CCTV cameras will be located where they can provide views of the following areas:

- All entrances and exits especially the North entrance, lower lobby, and the plaza level lobby main entrance
- Swimming pool
- Roof areas accessible from within the building
- Boiler rooms

3.3.2.2.2 Personnel Use and Area Control Requirements

The designation of particular personnel to assume the responsibilities described below must be specified in Phase I of the training program. The types of personnel who can best monitor the areas are identified. Of course, activities can always be supervised by professional teachers on a volunteer basis. Graduate students may be particularly useful at the swimming pool or snack area.

Area	Requirements
Gymnasium and Playgrounds	Accessible at all times to students in Stage III and above; the presence of any student requires a paid adult; not accessible to any Stage I or Stage II children except by teacher approval; accessible to community at specified times.
Swimming Pool	Accessible only by teacher approval; must be supervised whenever any students are in immediate vicinity, either by a volunteer with life-saving training or a paid nonprofessional with life-saving or swimming skills; instruction only by supervising teacher; accessible to community at specified times.
Roof Areas	Accessible at all times to all students only when volunteer or paid adult is present; accessible to community at all times.
Boiler Rooms	To be used for teaching purposes; accessible only under supervision of custodians, engineers, or teachers, depending on circumstances.
Snack Area	To be supervised by an adult at all times,

	preferably a volunteer; accessible to all students and community whenever building is open.

The times during which the community may use these facilities will be specified during Phase I of the training program.

Stages	Require professional teacher at all times that instruction is taking place.
Exterior Doors	Since all exits and entrances must be open at all times to satisfy fire regulations, these areas must be monitored by CCTV.

Though the community will have full access to the facility, provisions must be made to assure that all those who visit the building sign in and out, designating the purpose of their visit. This will encourage safety and will also reduce the likelihood of overload at any one location in the building during a particular time period.

3.3.2.3 Administrative Responsibility

The Administrative Coordinator will designate responsibility for monitoring the CCTV system both at the central office and at the central Resource Center.

Teachers will be responsible for monitoring the required personnel referred to in Section 3.3.2.2.2 for the areas immediately adjacent to their stage. The assignment of individuals to assume these responsibilities will be made by the Administrative Coordinator.

3.3.3 Design of Additional Procedures

Attached are forms relating to Fire Drills (Figure 3-11) and Injury to Pupils (Figure 3-12) for which procedures must be provided during Phase I of the training program.

Form No. 538

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF BUILDINGS AND GROUNDS
FRANKLIN ADMINISTRATION BUILDING
WASHINGTON, D. C.

Date ....

REPORT OF FIRE DRILL

School ....

Date of drill ....

Time of drill .... (a.m./p.m.)

Minutes required to evacuate building ....

Remarks:

....
Principal or Officer in charge of building

Distribution:

D. C. Fire Marshal, Room 125, District Building
Assistant Superintendent, Office of Buildings and Grounds

Figure 3-11

Form No. 324—Rev. 1964

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

Injury ____
(Non-Malicious Act)

REPORT OF INJURY TO PUPIL

Injury ____
(Malicious Act)

(Transmit to the Superintendent of Schools through regular channels by the close of the working day following the day of the injury)

Name ______________________ (Last / First / Middle) Home Address ______________________

School ______________________ Sex: M ___ ; F ___ ; Age ______ Grade ______

Time injury occurred: Hour: ______ A.M. ______ P.M. Date of Injury ______________________

NATURE OF INJURY

- Abrasion ____
- Blow ____
- Bruise ____
- Burn ____
- Concussion ____
- Cut ____
- ________ ____ Other
- Fracture ____
- Laceration ____
- Puncture ____
- Scratches ____
- Sprain ____
- Teeth Injury ____

DESCRIPTION OF INJURY (NON-MALICIOUS ACT)

How did injury happen? What was student doing?

____

____

____

____

PART OF BODY INJURED

- Abdomen ____
- Ankle ____
- Arm ____
- Back ____
- Chest ____
- Ear ____
- Elbow ____
- Eye ____
- Face ____
- Finger ____
- ________ ____ Other
- Foot ____
- Hand ____
- Head ____
- Knee ____
- Leg ____
- Mouth ____
- Nose ____
- Scalp ____
- Tooth ____
- Wrist ____
- ____

DESCRIPTION OF INJURY (MALICIOUS ACT)

How did injury happen? What was student doing?

____

____

____

____

____

Names of person or persons causing the injury

____

PLACE OF INJURY

- Athletic field ____
- Auditorium ____
- Classroom ____
- Corridor ____
- Dressing room ____
- Gymnasium ____
- Home Econ. ____
- Laboratories ____
- Lunch room ____
- Multi-purpose ____
- Playgrounds ____
- School grounds ____
- ________ Shop ____
- Showers ____
- Stairs ____
- Toilet ____
- ________ ____ Other

Teacher present when injury occurred: Yes ____ No ____ Name ______________________

First aid given: Yes ____ No ____ by (Nurse, teacher, other) ______________________

Treated by physician: Yes ____ No ____ Name ______________________

Sent to hospital or clinic: Yes ____ No ____ Name ______________________

Witnesses: Yes ____ No ____ Names ______________________

Parents notified: Yes ____ No ____ When? ______________ How? ______________

Pupil has school accident insurance: Yes ____ No ____

ADDITIONAL INFORMATION

(Use reverse side if additional space is needed)

1. Recommendation for preventing other injuries of above type

____

____

____

2. Action taken in way of punishing or referring person or persons causing malicious act injury ____

____

____

______________________ Assistant Superintendent ______________________ Principal ______________ Date Submitted

Figure 3-12

DESCRIPTION OF INJURY (NON-MALICIOUS ACT)—continued

DESCRIPTION OF INJURY (MALICIOUS ACT)—continued

ADDITIONAL INFORMATION—continued

LC-19

Figure 3-12 cont.

3.4 Student Transportation

3.4.1 Introduction

The specific transportation needs of the Fort Lincoln Schools are impossible to predict now because requisite information is lacking. Currently the regulations of the D. C. Schools require transportation to and from school only for handicapped children between the ages of seven and sixteen. There are three factors which have suggested an extension of transportation services in the Fort Lincoln Schools beyond the conventional D. C. provisions: the presence in school of children as young as three years old; the possibility of required attendance of preschool children at the Fort Lincoln School; and the hilly terrain of the First Facility site from Bladensburg Road to the building. These factors led the Special Projects Division and GLC to recommend an extended set of transportation services for all Stage I children in addition to the service for handicapped children provided by the D. C. Schools.

3.4.2 Variables

There are certain factors, which when weighed against each other, will affect the total transportation service for the First Facility. Until the dimensions of and needs resulting from these factors are identified, procedures can not be completed. The Special Projects Division is currently studying the problem, and will plan the system as time permits.

- It is expected that the total Fort Lincoln First Facility transportation budget will run approximately $14,000 to $15,000, sufficient to purchase one bus with related services. Because of budget limitations, services could be contracted through an outside agent, or possibly through the D. C. Schools.

- The extent to which students will come to Fort Lincoln School on a volunteer basis until housing is provided is not known. As suggested earlier, volunteer attendance provides the option of not supplying any services. In this case, the need to provide transportation must be made known to the parents of potential volunteer students.
- The exact daily attendance schedule of Stage I students will not be known until late spring of 1970. This factor will affect the extent of transportation services required, since a greater spread between entering and leaving times will require more frequent trips than a relatively tight schedule.
- The need for transporation services for field trips is not currently known, and may in fact be quite unpredictable even during initial operations. Experience suggests a substantial increase in the transportation budget in ensuing years will be needed because of significant field trip requirements.

It is readily apparent that the specifications for the transportation system must develop as the registration process begins and essential information becomes available. A decision can then be made regarding the use of a contractor to provide the service. If the search for a contractor is conducted by an outside organization, inquiries must begin on May 18 (see Midterm Report, Implementation Plan, Vol. III).

3.4.3 Recommendations

It is recommended that the following activities be conducted between now and the time school opens. The exact timing, as mentioned above, will depend upon the availability of information.

- The Special Projects Division, in conjunction with personnel of the D. C. Schools and whatever outside sources they wish, should study the efficiency and cost requirements of owned vehicles vs. contracted services.
- The Special Projects Division must consider whether daily arrival and departures of Stage I children should be limited in order to control transportation requirements.

Internal procedures for the management of the transportation program must await inputs by staff during the Phase I training program. These procedures will be concerned largely with responsibilities for supervision rather than with information collection and report generation. Also, the extent to which these will be handled by internal Fort Lincoln School personnel is a function of who provides the service. However, it is recommended that the Office Manager have overall responsibility for the transportation program, delegating the appropriate responsibilities if the service is largely handled internally.

3.5 Building Maintenance

3.5.1 Introduction

The First Facility physical environment has been treated at length in the Midterm Report, Volume III, Facility Plan. The school is to have an open environment in which the arrangement of physical components could be changed, and indeed require continual change to be most effective. The interior of the building is made up of components which can be erected and altered by an adult; some can be manipulated by students and some even by the smallest child. The facility is viewed as a tool for learning, realizing its maximum potential only when it is altered to fit a given situation. When adapting to this setting, it becomes apparent that at least two elements in the normal behavior pattern of adults in a school must change. One is the attitude of each adult toward the physical environment, i.e., his view of its utility; his readiness to participate in its manipulation; and his knowledge of how different features may be utilized. The second element that requires a fresh approach is the interrelationship of staff members and their responsibilities regarding building manipulation and maintenance. For example, it is expected that custodial personnel will develop an appreciation of the educational utility of seemingly mundane activities such as the planting of a tree or the routine check of a boiler. It is also expected that professional or paraprofessional personnel will see their participation in routine maintenance and cleaning activities as a realistic recognition of responsibility for maintaining the environment.

All of this will not occur simply by placing people in and encouraging them to manipulate the environment. The development of appropriate attitudes and responsibilities will be facilitated by first delineating, to the extent possible, the specific responsibilities of personnel and the procedures which they will follow. The second is a preservice training program for teaching and custodial staff which will focus on attitudes and further specification of procedures. This section is concerned with the first of these prerequisites -- delineation of responsibilities and procedures.

The following discussion is based upon the assumption that all formal Fort Lincoln School building maintenance operations will be conducted in-house -- that is, engineering and custodial staff would be employed by the Fort Lincoln Schools rather than contracting for maintenance services. The D. C. Schools might be consulted in order to identify potential applicants and process employees. Since the key element in the success of the building maintenance function is developing appropriate attitudes and gaining the support of staff members, it is important that they see themselves as contributing members of an organization.

3.5.2 General Maintenance Needs

Before recommendations can be made regarding staffing, responsibilities or procedures, consideration must be given to several general maintenance needs. These include the emergencies which might occur during the school day, such as window breakage or boiler malfunction; the minimum maintenance attention that must be provided for different areas of the building; and the uniqueness of some of the components in the building.

- There are certain service and multi-use areas which will require daily attention in addition to routine sweeping:
  - Lavatories -- cleaning
  - Snack areas -- equipment cleaning and checking
  - Gymnasium -- cleaning, spot repair, safety checks
  - Swimming pool -- checking water and safety devices (teacher responsibility)

  - Outside grounds -- repair damage to grounds and equipment
  - Roof areas -- checking equipment and safety measures.

- The individual stage areas will require attention which probably can be covered in the normal course of events during the day. Routine cleaning of stage areas should not be the responsibility of custodians, but should be shared by and rotated among members of the stage staff and student groups. (It is not envisioned here that routine cleaning will be a major daily task. Rather, it would include collecting papers, spot vacuuming and sweeping, arranging furniture, etc. Tasks such as regular heavy vacuuming and scrubbing are within the purview of the custodial staff). In this way, proper attitudes towards stage areas, pride, and self-discipline will be encouraged. The opportunity to conduct the routine maintenance function within stage areas then can be seized upon as a made-to-order learning opportunity.

  The functions which must be provided in total stage maintenance include: daily cleaning, storage of equipment, control of lighting and heating, provision of an adequate stock of cleaning supplies, and manipulation of furniture and general environment.

- There are certain other functions which will require special services or attention.

  - Clean-up after the community has used the facilities, requiring either self-policing or payment to a custodian or group to assume this responsibility. The latter consideration should be made only when the services would be extensive and would require considerable time by community residents.
  - Garbage removal, providing a good teaching learning opportunity. A compactor for garbage will be provided in the facility.

- Exterior grounds care on a regular basis, examining for and repairing damage to the area, planting new stock, and conducting a regular lawn cutting and preventive maintenance program. The teaching opportunities here, from landscape design to tree planting to learning about insecticides, cannot be overemphasized. Meeting this need has strong implications for establishing a close relationship between children and custodial staff.
- Plaza level, requiring special attention to cleanliness and orderliness because the area will be visible to the public, and also used as a snack area. Again, maintenance can be related to pride in the areas that are used frequently. It is expected that the community and students will bear the major responsibility for caring for this area, though again major periodic tasks must be conducted by a custodial staff member.

3.5.3 Staff

3.5.3.1 Overall Responsibility

The Administrative Coordinator will have general administrative responsibility of the building maintenance function, delegating specific charges to professional, paraprofessional, volunteer, and custodial staff.

The work of all building maintenance staff relating to operations across stages and for specific areas will be coordinated by the Office Manager. However, the custodian when serving the needs of a particular stage will be directed by the professionals within the stage, particularly the stage representative.

3.5.3.2 Staff Members and Schedules

The building must be staffed continuously Monday through Saturday from 6:30 a.m. to 7:30 p.m., with some overlap between shifts to provide continuity. Work beyond 7:30 p.m., when the facility is to be used for community purposes, is provided for in the Community Participation Plan. However, a night watchman must be on duty between 10:00 p.m. and 6:00 a.m.

An interesting alternative to providing a paid night watchman is the possibility of providing 2-member teams of community volunteers who would patrol the building at specified hours between closing and opening times. The teams would be reliable individuals whose job it would be to check the building for security and fire. Of course, this does present the challenge of coordination of responsibility. But the setting is right, and the approach is certainly worth trying since it has been attempted successfully elsewhere. One district reports a decrease in total night vandalism at a savings in cost of a night watchman's salary per building.

The staff would consist of two custodian/cleaners, one full-time building engineer, and one assistant engineer. The engineer's primary functions would be to operate and service the technical equipment, provide leadership and support in the area of creative facility use, develop the budget for maintenance operations, and make custodial staff recommendations to the Administrative Coordinator.

In summary, the following full-time equivalents of staff members will be required.

Custodian/Cleaner	2.0
Building Engineer	1.0
Assistant Engineer	1.0

In addition, 2 half-time cleaners should be added, at least one of whom should be a woman.

The suggested schedule would be as follows:

6:30 a.m. - 3:00 p.m.	Custodian/Cleaner
9:00 a.m. - 5:30 p.m.	Engineer
2:30 p.m. - 7:30 p.m.	Custodian/Cleaner

The requirement of providing services six days a week could result in a staffing problem because only $31,000 has been allocated for maintenance personnel during the first year of operation. As a result, creative use of personnel is critical to meeting Fort Lincoln School needs.

3.5.3.3 Activities

Function	Responsibility
• Daily housekeeping of stage	Stage Representative -- delegates within stage to paraprofessionals and students. Custodial staff will have no regular responsibility for routine cleaning as defined here, but will be responsible for heavy duty scrubbing and vacuuming.
• Regular cleaning and checking of	Engineer -- delegates tasks to custodial staff.
- snack areas	
- gymnasium	
- swimming pool	Physical Education Teacher
- roof areas	
- outside grounds	
- lavatories	
• Maintenance of boiler room	Engineer
• Assistance to teachers in creative use of facility	Engineer/Custodian
• Assistance to teachers in physical manipulation of environment	Custodian
• Storage of equipment	Stage representative -- delegates to assistants
• Maintenance of custodial inventory	Custodian
• Garbage removal	Custodian

It must always be kept in mind that the educational utility of these activities and the strength of support they receive will be constantly reviewed by the Administrative Coordinator and teaching staff.

3.5.4 Development of Procedures

During Phase I of the training program, attitudes of staff will be developed conducive to innovative uses of buildings, so that the physical facilities actually serve the needs of the educational program. Staff members at all levels will be able to probe into areas of concern not even referred to here or difficult to answer at this time.

- During the preservice training program, the engineer and the Administrative Coordinator will identify by name those who will assume the responsibilities referred to in Section 3.5.3.3.
- After these individuals are identified, regular cleaning and maintenance schedules will be established. In-service training for all staff members in the use of moveable partitions, etc. will be scheduled, and ways in which students may be involved in the building maintenance process will be identified. Regular cleaning and maintenance functions should be scheduled at minimum student load times during the day and week.
- The responsibility for storage of equipment will be designated.
- Forms and procedures will be developed for requesting special work to be performed requiring custodial services which entail additional expenditure of funds or use of custodial time. Figure 3-13 is the form used by D. C. personnel to request special work to be performed by the Buildings and Grounds Department.
- An Information System should be developed to evaluate the use and serviceability of the facility for faculty, students, and

NOTE: Use Typewriter Only

DO NOT WRITE IN THESE
SPACES—RESERVED FOR
PROGRAM PLANNING

Form B & G [illegible]

GOVERNMENT OF THE DISTRICT OF COLUMBIA
DEPARTMENT OF BUILDINGS AND GROUNDS
REQUEST FOR WORK TO BE PERFORMED

NO.____________________

Issue Date____________________

Work to be Performed for: Request No.____________________

Department____________________ Division____________________

Location of Work____________________

Description of Work to be Performed:

ESTIMATE:	
Labor	
Man Days	
Material	
Total	
FUNDING	
Fiscal-Year	
Working Fund	
Capital Outlay	
Salaries & Expenses	
WORK TO BE PERFORMED	BY
R. & I. Div.	
Ofc. of D. & E.	
Const. Mgmt. Div.	
Bldgs. Mgmt. Div.	
Program Planning	
Supply Br.	
Contract	

Date____________________ Signature____________________ Title____________________

Figure 3-12

community. The information system would serve internal administration, the D. C. Board of Education, and Fort Lincoln community groups by generating monthly reports during the first year. The output of the system should be examined regularly by the Administrative Coordinator, Office Manager, and Engineer in order that methods can be developed for using information to evaluate building serviceability. The information system should show, at a minimum:

- Extent and nature of outside use
- Pupil and faculty loading on hourly and daily bases
- Equipment efficiency
- Daily cleanliness
- Vandalism
- Repair requirements and costs
- Role of custodians, teachers, assistants, pupils, volunteers

3.5.5 Sample Maintenance Schedule

The need to make assignments for particular tasks during the Phase I training program was discussed earlier. A sample maintenance schedule for a given day is presented in this section, in terms of tasks to be completed and the time which might be allotted to them. This must be viewed only as an example, perhaps to be used in future discussions. It must also be understood that this is not meant to represent the schedule of only one man, but may in fact represent an almost complete description of all regularly required predictable tasks which actually could be assigned to more than one person at a given time. The specification of this schedule for particular individuals must await the Phase I of the training program.

6:30 a.m.	Open building and check for vandalism Review extradordinary maintenance, repair or usage requests for that day
7:00 a.m.	Service building and educational equipment Manipulate partitions Test water in pool
8:00 a.m.	Conduct outside grounds maintenance activities Check snack areas
9:00 a.m.	Manipulate partitions Conduct needed building repairs Arrange for daily garbage removal Continue through facility to survey how the building is being used and his own personal contribution to the program
10:00 a.m.	Check lavatories for cleanliness and any malfunctioning Conduct needed building repairs
11:00 a.m.	Maintain snack areas Maintain plaza level lobby Be on call for miscellaneous needs
1:00 p.m.	Maintain snack areas Receive and store deliveries Remove garbage
2:00 p.m.	Review following day's needs with staff Manipulate partitions Check outside grounds and roof areas for safety and damage
3:00 p.m.	Clean gymnasium Clean all lavatories Service building and educational equipment
4:00 p.m.	Remove garbage Conduct all heavy cleaning and waxing Maintain and clean plaza level lobby

3.6 Food Services

3.6.1 Introduction

Providing meal services to Fort Lincoln First Facility students is another area for which procedures can not yet be specified, since adequate information is not available regarding the needs and demands of students. Several factors are known, however, which suggest that a broad variety of services may be required. Since some students and adults will start the day quite early, they must be able to buy breakfast, with free breakfasts for those students who are unable to pay. Lunches will be provided on the same basis. In addition, snacks will be available in a lounge area on each level to students, staff, and community throughout the day.

The operating budget for the food service program for the first year is $87,500.

3.6.2 Program Management

It is recommended that the food service function be contracted (if economically feasible) to a food concessionaire, and that the internal overall administration be the responsibility of the Office Manager. This arrangement does not preclude students from receiving significant educational benefit from the food services program.

3.6.3 Food Options

Three basic options will be available:

- Breakfast consisting of dry cereal or instant hot cereal, milk and juice;

- Lunch consisting of meat, fish, eggs (or the equivalent nutritional substitute) vegetables, fruit, bread, and milk;
- The opportunity to select from various items such as: soups, sandwiches, puddings, jello, fresh fruit, cake, milk, coffee.

It will be possible to have a larger variety of foods that are easily accessible if they are largely prepackaged and frozen and prepared in a central facility by a rapid cooking or heating process. This approach also minimizes the need for offering only a particular set of foods.

3.6.4 Participants

The number of children desiring free or regular meals can be determined to some extent during the registration process. This information will be useful when the contract for food services is negotiated .

3.6.5 Procedures

3.6.5.1 Supervision

The areas in which students are eating will be supervised by volunteers (particularly college students) and paid community helpers, if necessary, depending upon the control requirements established for handling money. These assignments will be made by the stage representative. During Phase I of the training program, a determination will be made regarding the age limits of students who will be encouraged to secure their own meals and to clean up afterwards.

Current Washington Teachers' Union regulations require that teachers supervise students in lunch areas. Because this is not recommended in this report, negotiations may have to be conducted with WTU before school opens. It is recognized, however, that teachers might supervise students who are eating in instructional areas.

Hot meals should be prepared in the central facility and delivered by volunteers to the snack area on each level. Children could then go to the snack area, when appropriate, to get their food.

3.6.5.2 Planning

When weekly programs are planned for children, their meal times must be specified and money collected, where necessary. Money will be collected on a periodic basis for economy and to avoid students discriminating against those who will receive free lunches. In lieu of money or permission for free lunches, tickets will be given to all children for lunch purchase. In this way, the student who receives a free lunch will not be singled out to his peers. The information will be collected in each stage and forwarded to the stage representative. It will be his responsibility to distribute the information to the adults within the stage to ensure adequate supervision of the adjacent snack area. At the same time, the information and money will be forwarded to the Office Manager by each stage representative for appropriate planning and accounting.

3.6.6 Educational Utility

There are many ways in which the food program can be used as a educational experience for both students and the community. The most valuable educational aspect of the program is the opportunity to study nutrition and learn to prepare healthful foods at home. Community participation in the daily operations of the schools will expose adults to good nutrition and food preparation methods which they can use in their homes. The specific manner in which this can be accomplished should be considered during curriculum development.

In addition, the setting in which children will eat is conductive to a social learning opportunity, since staff at all levels will be encouraged to eat with the children whenever feasible.

The following should be included in an educational program developed for students and/or the home:

All Participants

- Nutritional value of food and minimum daily requirements
- Social behavior in group eating -- consideration for others
- Personal and kitchen hygiene

Stage III and above, and Parents

- Meal planning -- nutritional and economic
- Instititional management
- Food preparation

The home nutrition education program might best be conducted in workshop activities for parents, coordinated by the Resources Coordinator. Community volunteers, e.g., domestics, catering employees, dieticians, etc., may lead the workshops, drawing upon personal or professional experience. Parents should also be invited to tour the food planning facilities.

3.6.7 Community Use

Use of the food service facilities for any activity other than a normal school function should be considered by staff and community participants in Phase I of the training program or shortly after school opens. The extent of community demand may not be known for some time, or until the community begins to make use of the facility. The option of using the services of the contractor beyond normal school hours should be explored.

3.6.8 Evaluation

For the purpose of modifying food service offerings and management, an information system relating to the use of the food services program must be established. The information requested can be utilized by staff and community representatives for analyzing many factors. For example, the usage patterns of students and staff might be examined by studying the following data showing:

- Number of breakfasts and lunches
- Number of free meals
- Regularity with which individuals eat entire meals
- Extent of community use
- Participant satisfaction
- Staffing requirements (in addition to normal kitchen staff)

3.7 Personnel Records and Payroll

3.7.1 Current System

The present system of personnel records management within the Schools is inadequate for generating useful evaluative and planning information and for reasonable payment cycles for those who work on an irregular part-time basis. Considerable paper work is generated during the hiring process, yet little useful data can be produced for examining staffing patterns, vacancies, strengths and weaknesses, etc. It is difficult to identify personnel costs for particular programs; information regarding staff vacancies is not produced periodically; and information on professional capabilities is not readily available. These are just a few examples of the personnel information shortcomings in the present system.

It can not be expected that the proposed system will completely correct the existing inadequacies or provide an ideal personnel information system. Rather, it must be viewed as an interim system in which some of the issues and principles to which the school administrators must be sensitive will be identified. It will also attempt to identify the components of a record system which will eventually serve as an appropriate data base for a useful personnel information system. A permanent system may evolve as the Fort Lincoln School comprehensive information system is developed.

Because the Recruitment Plan for staffing the Fort Lincoln Schools will use the D. C. procedures and requirements for certification and regular appointments, the related forms will provide the basic information for the personnel records. However, this does not preclude modifying that information for use by the Fort Lincoln Schools.

The process for the selection and hiring of personnel for the Fort Lincoln Schools is specified in Section 2, Organization/Staffing Plan, pp. 2-73 to 2-95. According to this design, the Personnel Office of the D. C. Schools will approve, certify, and take all other necessary steps for the final appointment of staff.

Candidates will be screened by the Personnel Subcommittee and the school administration of Fort Lincoln. The Staffing Plan of Volume II specifies the steps and respective responsibility in the hiring process. When an individual or groups are approved for hiring, the Personnel Subcommittee will forward the list to the Fort Lincoln School administration and the Special Projects Division. Eventually this list will be sent to the D. C. Schools for appropriate action. The Board Order resulting from D. C. Board of Education action will be cut and processed by the D. C. Schools' Personnel Office, with a copy of the transaction going to the Special Projects Division and the Staff Development Coordinator . The clerical staff of the First Facility, reporting to the Staff Development Coordinator, will process and maintain all information regarding Fort Lincoln staff.

3.7.2 Fort Lincoln School Personnel Records System

3.7.2.1 Responsibility

The supervision of the Fort Lincoln School personnel records and payroll system will be the responsibility of the Staff Development Coordinator. Records and reports will be duplicated and stored both in the stages and in the central office. Though the initial system will be manually operated, it is expected that the specifications for an automated system will begin to be developed during the first school year.

The daily maintenance of the records system will be the responsibility of an administrative secretary. Inputs will be provided by all staff using procedures and forms developed in consultation with the Staff Development Coordinator during and after Phase I of the training program.

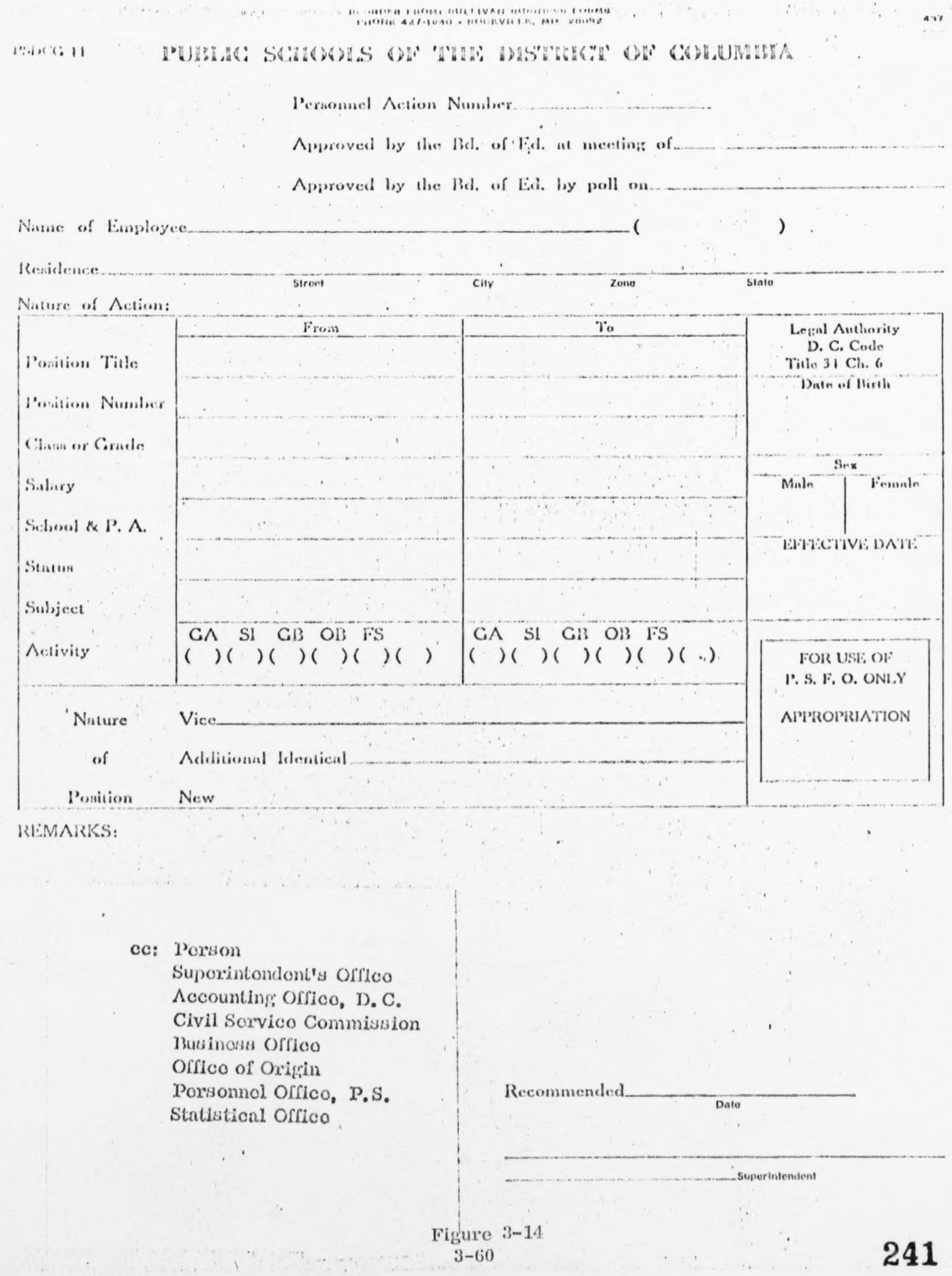
3.7.2.2 Information Sources

The principal source of basic information regarding staff will be generated from the Board Order, Form PSDCG 11, Figure 3-14. This form will be forwarded from the D. C. Schools when the appointment of the individual is made official by action of the Board of Education. In order to improve its utility, the following information should be added to this form:

- Program code -- will show entry for activity (program code), as described in the Accounting System (see Section 3.10.5). This will relate personnel costs to programs, and should be used in addition to the current D. C. numerical coding system for personnel, currently being revised.
- Profile of Strengths and Weaknesses -- see Section 2, Recruitment Process, pp. 2-73 to 2-89.
- Personal Resume -- to include all training and experience which may be relevant in any way to Fort Lincoln School needs.

3.7.2.3 Developmental Records

As the Fort Lincoln Schools begin operation, certain information must be collected which, when combined with the information discussed above, will provide the basis for developing useful analytical and evaluative reports.



REORDER FROM SULLIVAN BUSINESS FORMS
PHONE 427-1040 • ROCKVILLE, MD. 20852

437

PSDCG 11

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

Personnel Action Number.............................

Approved by the Bd. of Ed. at meeting of.............................

Approved by the Bd. of Ed. by poll on.............................

Name of Employee_____________________________( )

Residence.............................
Street City Zone State

Nature of Action:

	From	To	Legal Authority D. C. Code Title 31 Ch. 6
Position Title			Date of Birth
Position Number			
Class or Grade			
Salary			Sex Male Female
School & P. A.			EFFECTIVE DATE
Status			
Subject			
Activity	GA SI GB OB FS ( )( )( )( )( )( )	GA SI GB OB FS ( )( )( )( )( )( )	FOR USE OF P. S. F. O. ONLY APPROPRIATION
Nature of Position	Vice_____		
	Additional Identical_____		
	New		

REMARKS:

cc: Person
Superintendent's Office
Accounting Office, D. C.
Civil Service Commission
Business Office
Office of Origin
Personnel Office, P.S.
Statistical Office

Recommended_____________________
Date

____
Superintendent

Figure 3-14

3.7.2.3.1 Staffing Needs

At the beginning of each year, and bi-monthly thereafter, a report will be generated which will display:

- The number of positions to be filled
- The specialities to be acquired
- The progress made in filling positions

This information will be shared with all staff members and will be used by the Staff Development Coordinator in carrying on the recruitment program.

3.7.2.3.2 Staff Development Records

This will be a composite of individual profiles developed for each teacher which will display the specific steps taken towards realizing personal professional development objectives. The individual reports can be used by the Staff Development Coordinator to develop reports for community and Fort Lincoln and D. C. School officials. These reports would concern development efforts of individuals and groups, as well as personnel evaluation.

3.7.2.3.3 Staff Utilization Records

These records will show by individual and compositely how professional, paraprofessional, and volunteer staff members are using their time.

For each category of persons, individual records will show how much time is spent on:

- Clerical tasks
- Parent/student planning
- Individual teacher planning
- Stage planning

- Task Force meetings
- Instruction -- (Prescription, Diagnosis)
- Group instruction
- Other

The monthly examination of these reports will indicate the extent to which actual time spent by staff on these activities corresponds to the time projected for them in the original Fort Lincoln plan. This information will serve as an early warning device, indicating whether staff functions are being distributed as planned.

3.7.2.3.4 Volunteer Services

To enhance staff flexibility, continuously revised records must be maintained of the volunteers available to serve in the Fort Lincoln Schools. As a minimum, these records must show:

- Name
- Capability
- Availability
- Evaluative Comments

These records and all the related detailed forms should be developed under the direction of the Staff Development Coordinator. The issues and requirements must be addressed in Phase I of the training program. Specifications for procedures can begin to be written when the First Facility starts operation.

3.7.3 Other Records

Figures 3-15 to 3-24 are copies of forms which are required by the D. C. Schools to be completed to ensure staff safety and personal welfare.

Form No. 464

PERSONNEL CARD

P-4288

Major ____________________
Minor ____________________

Name ______________________________________
Last First Middle

Degrees: ______________________________

Address ______________________________________

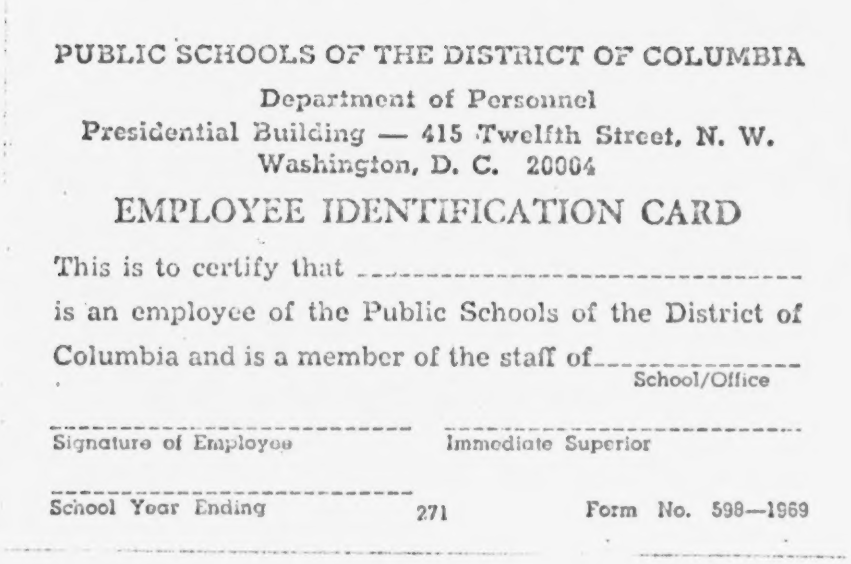
Telephone ____________________

Date of Birth ____________________
Place of Birth ____________________

Effective Date	Board Action Date	Type of Action	Salary Class or Grade	Salary	Position or Bureau Number	Position, Subject, or Grade	School	Remarks

Effective Date	Board Action Date	Type of Action	Salary Class or Grade	Salary	Position or Bureau Number	Position, Subject, or Grade	School	Remarks

Figure 3-15



PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
Department of Personnel
Presidential Building — 415 Twelfth Street, N. W.
Washington, D. C. 20004

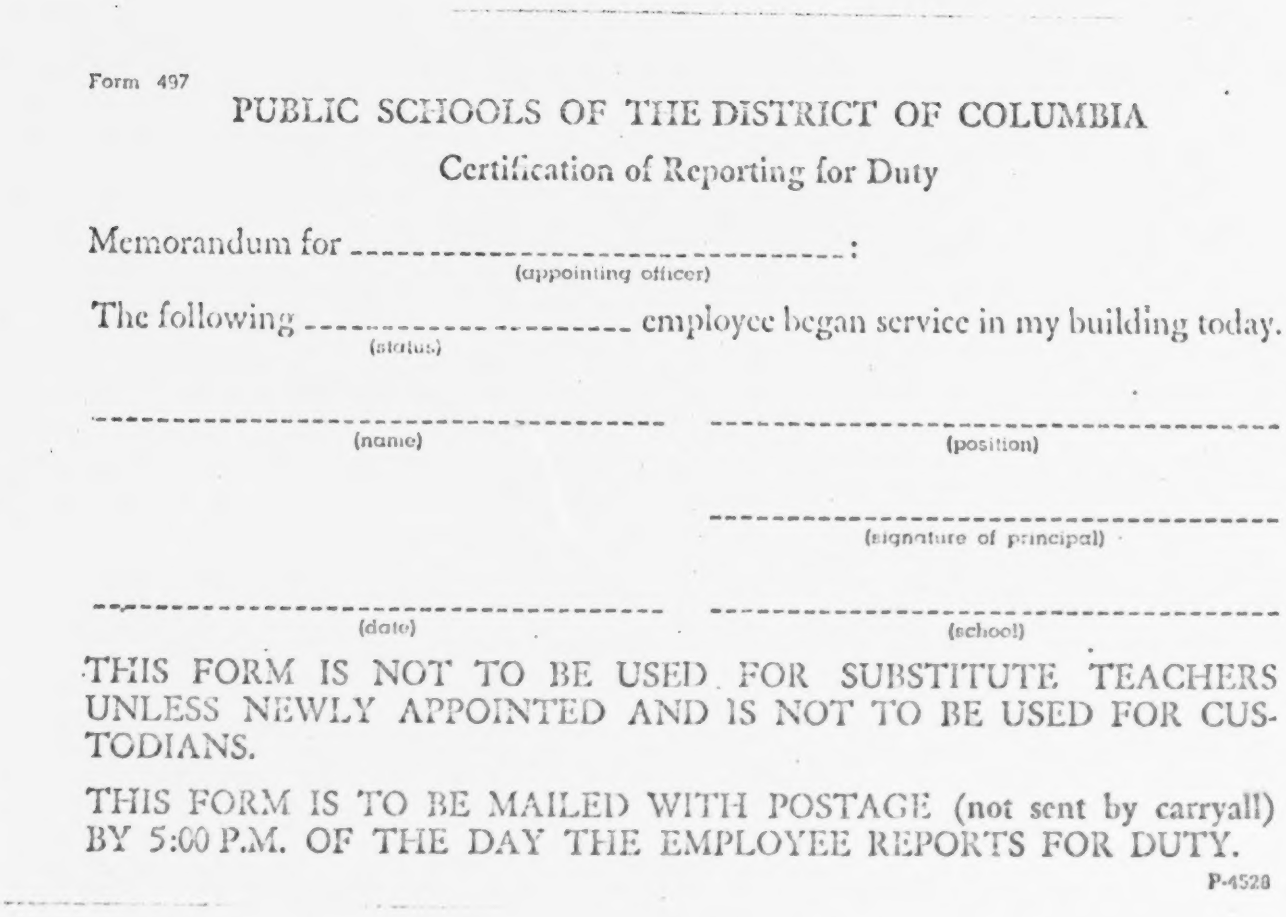
EMPLOYEE IDENTIFICATION CARD

This is to certify that ________________________________
is an employee of the Public Schools of the District of Columbia and is a member of the staff of ______________
School/Office

____________________________ ____________________________
Signature of Employee Immediate Superior

____
School Year Ending 271 Form No. 598—1969

Figure 3-16



Form 497

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

Certification of Reporting for Duty

Memorandum for ________________________________:
(appointing officer)

The following ____________________ employee began service in my building today.
(status)

______________________________	______________________________
(name)	(position)
	______________________________
	(signature of principal)
______________________________	______________________________
(date)	(school)

THIS FORM IS NOT TO BE USED FOR SUBSTITUTE TEACHERS UNLESS NEWLY APPOINTED AND IS NOT TO BE USED FOR CUSTODIANS.

THIS FORM IS TO BE MAILED WITH POSTAGE (not sent by carryall) BY 5:00 P.M. OF THE DAY THE EMPLOYEE REPORTS FOR DUTY.

P-4528

Figure 3-17

PSDCO - Revised [illegible]

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
REQUEST FOR AN ADVANCE OF SICK LEAVE FOR TEACHERS AND ATTENDANCE OFFICERS

(To be Prepared in Triplicate)

______________________, 19____
(Date)

Name of Employee ______________________________

Title of Position ______________________________

School or Department ______________________________

Type of Appointment ______________________________
(Permanent or Probationary)

Advance leave of ________ days is herewith requested because of ______________________________

____

____
(Nature of disability)

(See the physician's certificate attached to this application).

Advance leave requested to extend from ______________, 19____ to ______________
(Days requested must be consecutive)

19____, both dates inclusive.

To be completed in Payroll Office:

Leave accumulated to date ________ days.

Leave taken to date ________ days.
(Current School Year)

Computed by ______________________
(Payroll Supervisor)

____
(Signature of Applicant)

____
(Street)

____
(City)

RECOMMENDED FOR APPROVAL:

____
(Immediate Supervisor)

____
(Assistant Superintendent)

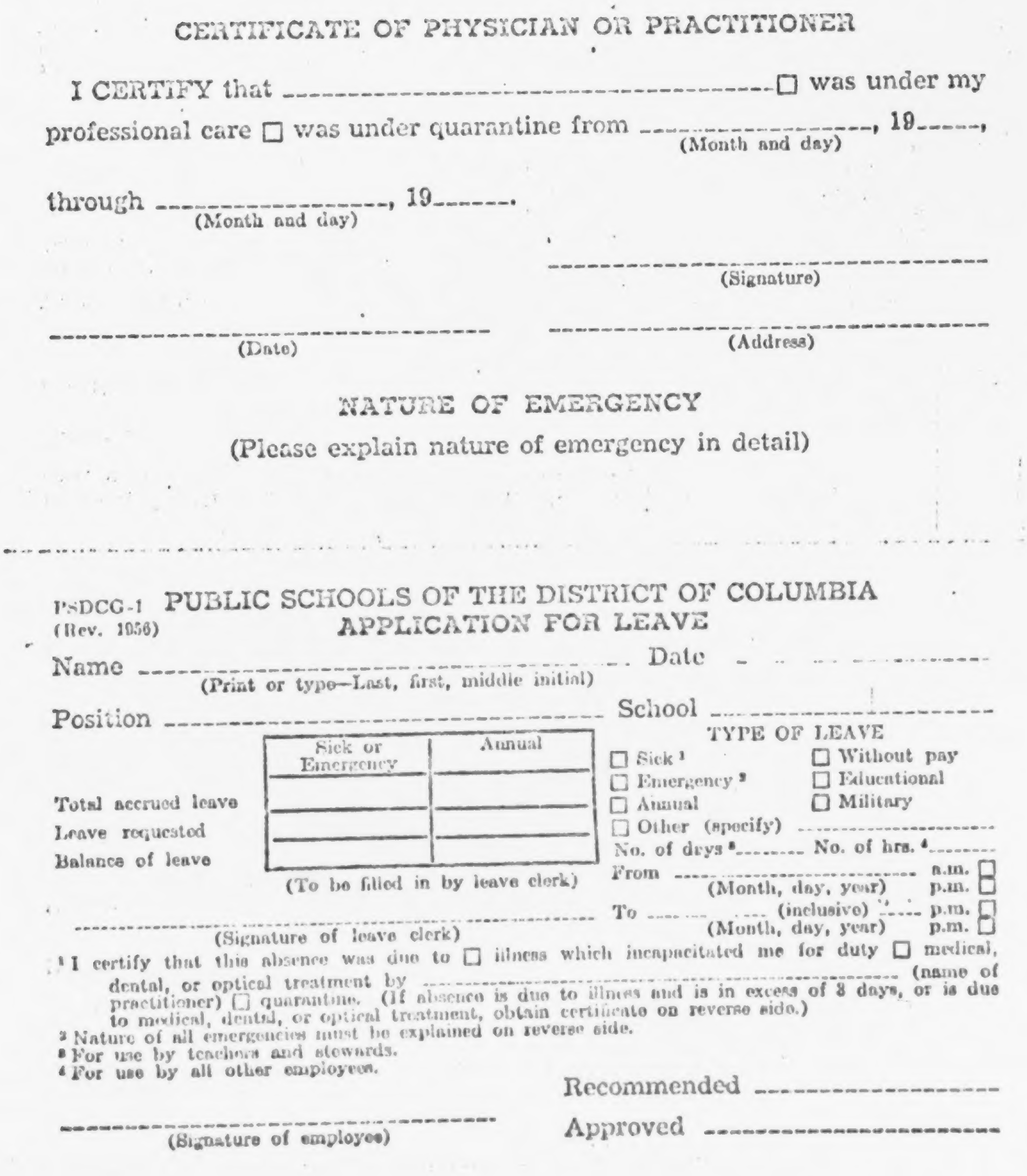
____
(Deputy Superintendent)

APPROVED:

____
(Superintendent of Schools)

______________________________, 19____
(Date)

Figure 3-18



CERTIFICATE OF PHYSICIAN OR PRACTITIONER

I CERTIFY that ______________________ ☐ was under my professional care ☐ was under quarantine from __________ (Month and day), 19____, through __________ (Month and day), 19____.

__________________ (Signature)

__________________ (Date)

__________________ (Address)

NATURE OF EMERGENCY

(Please explain nature of emergency in detail)

PSDCG-1
(Rev. 1956)

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
APPLICATION FOR LEAVE

Name __________________ (Print or type—Last, first, middle initial) Date __________

Position __________________ School __________

	Sick or Emergency	Annual
Total accrued leave		
Leave requested		
Balance of leave		

(To be filled in by leave clerk)

__________________ (Signature of leave clerk)

TYPE OF LEAVE

☐ Sick [1] ☐ Without pay
☐ Emergency [2] ☐ Educational
☐ Annual ☐ Military
☐ Other (specify) __________

No. of days [3] ______ No. of hrs. [4] ______

From __________ (Month, day, year) a.m. ☐ p.m. ☐

To __________ (Month, day, year) (inclusive) p.m. ☐ p.m. ☐

[1] I certify that this absence was due to ☐ illness which incapacitated me for duty ☐ medical, dental, or optical treatment by __________ (name of practitioner) ☐ quarantine. (If absence is due to illness and is in excess of 3 days, or is due to medical, dental, or optical treatment, obtain certificate on reverse side.)

[2] Nature of all emergencies must be explained on reverse side.

[3] For use by teachers and stewards.

[4] For use by all other employees.

Recommended __________

Approved __________

__________________ (Signature of employee)

Figure 3-19

Due on Monday of each week

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

REPORT OF ABSENCE—OFFICERS AND CLASSIFIED EMPLOYEES

_______________________ Week ending _______________________

School

This is to certify that all officers and classified employees, except as listed below, were present each work day during this week as required by the rules of the Board of Education.

NAME OF EMPLOYEE (Arrange Alphabetically)	DATE OF ABSENCE	* NUMBER OF DAYS ABSENT (If employee was injured in line of duty, please make notation)			
		S	WP	A	O

* Key: S—Sick; WP—Without Pay; A—Annual; O—Other.

_______________________ Signature of Official

_______________________ Date

Figure 3-20

Due each week.

PsDCG

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
REPORT OF ABSENCE

_______________ Week Ending _______________

This is to certify that all ☐ Teachers ☐ Attendance Officers, except as listed below, were present each work day during the week as required by the rules of the Board of Education.

NAME OF EMPLOYEE	DATE OF ABSENCE	*NUMBER OF DAYS ABSENT (If employee was injured in line of duty, please make notation.)				
		With Pay		Without Pay		
		S	E	S	E	O

*Key: S—Sick; E—Emergency; O—Other

2

_______________ Signature of Official

_______________ Date

Figure 3-20A

3-69

Due on the 5th of each month.

PUBLIC SCHOOLS OF [illegible]

Certification of Services Rendered by
Substitute Teachers and Attendance Officers

For the month of ________________ 19____

____
School or Department

Name of Substitute (Arrange alphabetically)	Number of Days of Service	Name of Teacher or Attendance Officer for Whom Services Were Rendered (Indicate date of service after each name)

____
Clerk Preparing Report

Certified: ____________________________
Signature of Certifying Officer

P-5210

Date ____________________________

Figure 3-21

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA

DIRECTORY OF EMPLOYEES

Office of ____________________ (This line is to be filled in by officers only) ____________ (Date)

School ____________________ (Name in full) ____________________ (Location of school) ____________ (Zip Code)

NOTE.—This blank is to be used for all employees. The principal or official in charge will forward copies of this directory to the Office of the Statistician, giving information as of the first school day in October, in accordance with the Superintendent's Circular concerning Directory of Employees. Officers, teachers, and clerks should be listed together in alphabetical order. Also, custodians, engineers, and other employees should be listed together in alphabetical order.

	MR. MRS. MISS	FIRST NAME	IN.	LAST NAME	* TITLE OR POSITION	RESIDENCE	Zip Code	PHONE NO.
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								

* [illegible]

Figure 3-22

Form 527—Revised 1963

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
FRANKLIN ADMINISTRATION BUILDING
13TH AND K STREETS, N. W.
WASHINGTON, D. C. 20005

FORM TO BE EXECUTED BY WOMEN EMPLOYEES REQUESTING CHANGE OF NAME BY REASON OF MARRIAGE

The Superintendent requests that women employees of the Board of Education requesting change of name because of marriage fill in and submit the following form through regular channels.

TO THE SUPERINTENDENT OF SCHOOLS:

I hereby request that my name be changed on the school records

from ______________________________

to ______________________________

effective ______________________________

Information concerninng my marriage is furnished as follows:

Date of marriage ______________________________

Place of marriage ______________________________

Name of person officiating ______________________________

Marriage certificate number ______________________________

____
Signature

Forwarded:

____
Principal

____
Assistant Superintendent

____
Deputy Superintendent

Figure 3-23

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
WASHINGTON, D. C.

CHANGE OF ADDRESS AND/OR TELEPHONE NUMBER

Name ____
(List name exactly as it appears on payroll)

School ____

Title of Position ______________________________

Check one:
( ) Perm.
( ) Prob.
( ) Temp.
( ) Temp.Indef.

New Street Address ______________________________

____
(City) (State) (Zip Code)

New Telephone Number ______________________________

Social Security Number ______________________________

Date ____________ ______________________________
(Signature of employee)

Please forward one copy to the Department of Personnel within three (3) days after change of address.

Figure 3-24

3.8 Staff Scheduling

The matter of deployment of staff has been treated at length in this report, Section 2, Organization/Staffing Plan, pp. 2-52 to 2-69. The Staff Scheduling Procedures described here identify the administrative responsibility for the procedures, information requirements for their effective administration, and warning indicators should the system not be functioning as planned. In general, they provide the staff with the tools necessary to initiate staff scheduling, which will be an on-going process. It is impossible at this point to identify all procedures and alternatives since the exact nature of the staff and composition of the student body are not yet known.

3.8.1 Administrative Responsibility

The Staff Development Coordinator, with the aid of the Master Teacher, will have the responsibility of managing data and report production, supervising the operation of procedures, and assuming leadership in staff scheduling. In addition, the Staff Development Coordinator, Master Teacher, and Administrative Coordinator will conduct initial evaluations of the efficiency of staff scheduling, and will consult with whoever may seem appropriate regarding adjustments. Internal stage scheduling concerns can be discussed during the stage meetings.

In the first three months of operation, staff schedules should be duplicated by the Staff Development Coordinator and distributed to all staff and again on as regular a basis as the frequency of individual scheduling changes requires. After the first three months, modifications in preparing and sharing this information may be considered.

It will be the responsibility of the Stage Representative, reporting to the Staff Development Coordinator, to monitor daily scheduling during the early operations of the Fort Lincoln School to assure that adequate minimum coverage is provided and individual students are receiving appropriate adult assistance. Particularly important is the necessity to verify the assumption that adult absences will require virtually no substitutes because staffing provisions will provide a self-sealing system.

3.8.2 Information System

The key to successful staff scheduling is an information system which will allow for summary evaluations by verifying assumptions and indicating roadblocks to implementing plans. Actual scheduling procedures simply require decisions by personnel regarding their availability, publication of the availability schedules, and adherence to commitments.

3.8.2.1 Assumptions

Staff scheduling can begin during Phase I of the training program as soon as certain information is available regarding student enrollment and staff capabilities and availability. The actual staff schedules can be developed with little difficulty using the guidelines described on pp. 2-52 to 2-69 of this report, Section 2, Organization/Staffing Plan, unless the assumptions which have been made are grossly out of line with actual facts. If the assumptions prove to be incorrect, then adjustments must be made in staff and student assignment. Therefore, the first requirement for staff scheduling is to examine the following data relating to the assumptions:

- Listing of professional specialties by stage and salary level.

- Age distribution of students within stages.
- Percentage of students choosing to attend school on Monday through Friday or Tuesday through Saturday schedules, and those choosing to attend on Saturday for special purposes. This will permit actual student loading by day to be displayed.
- Hourly distribution of students, indicating the staff coverage required during any one day.
- Listing of staff vacation choices.
- Listing of expected volunteer service, by capability and dates and hours available.

3.8.2.2 Evaluation

The evaluation of staff scheduling efficiency will require information indicating the extent to which particular objectives of daily operation are being met. Some warning indicators which can be used for system evaluation will be obtained from reports generated on a weekly basis during the first six months of school operation. The reports will contain data on:

- Staff activities during 6 1/2 hour working period, showing particularly the time spent on: individual instruction, student planning conferences, individual professional planning, clerical tasks, study supervision, stage planning, in-service training, etc. can be gathered from the personnel records system, and a display of daily activities should be produced.
- Staff capabilities, according to subject areas. See this

report, Section 2, Organization/Staffing Plan, p. 2-54). Where specific capabilities are missing, compensatory approaches should be considered.

- Hourly ratio of students to professional personnel -- not to be lower than 20:1.

The warning indicators may suggest a need for re-evaluating staff deployment.

3.9 Procurement

The need to provide a streamlined procurement process for the Fort Lincoln Schools is based upon the slow turnaround time and less than adequate inventory control of the D. C. Schools' procurement system. In addition, the procurement process for the Fort Lincoln Schools cannot rely extensively upon the procedures of the D. C. Schools, since such an arrangement would add to the operating burdens of the parent system. Therefore, in this section a rather simple manual procurement system will be described which can be expanded and refined as the Fort Lincoln Schools begin operation.

3.9.1 Objectives

The system design described here will attempt to:

- Permit rapid acquisition of required materials;
- Permit purchase by personnel, including students, who are close to the level of use;
- Permit teachers to purchase materials using discretionary funds established for this purpose;
- Provide methods of inventory and financial control.

3.9.2 Responsibilities

The overall administration of the procurement process will be the responsibility of the Administrative Coordinator. Daily operations will be supervised by the Office Manager, with the assistance of his clerical staff and the central Resource Coordinator.

The central Resource Coordinator, with the assistance of paid community aides, will be responsible for the central inventory control. The Coordinator will also assist stage representatives in designing the methods for controlling inventory within stages.

Teachers will participate in the procurement process through the initiation of requisitions and purchase orders, the maintenance of related account books, and the supervision of the activities of students in Stages II and above who demonstrate the capability of generating their own purchase orders. Teachers and students may also be permitted to make direct purchases within the guidelines that are established during Phase I of the training program.

3.9.3 Procedures

3.9.3.1 Requisitions

Figure 3-25 shows the procedure to be used when a requisition for materials is initiated by a staff member. The requisition may originate as a periodic or annual requisition, or as a special request for an item needed during the year.

3.9.3.1.1 Periodic Requisitions

Periodic requisitions are those which usually occur on an annual basis and generally reflect program planning. The dates for submitting these requisitions will be determined by the Office Manager. He will examine requests for completeness and accuracy and will insert additional budget data when necessary. He will consult with the requestor concerning any changes necessary, and will inform him of the action taken on the requisition. Figure 3-26 depicts the procedures for handling a periodic requisition.

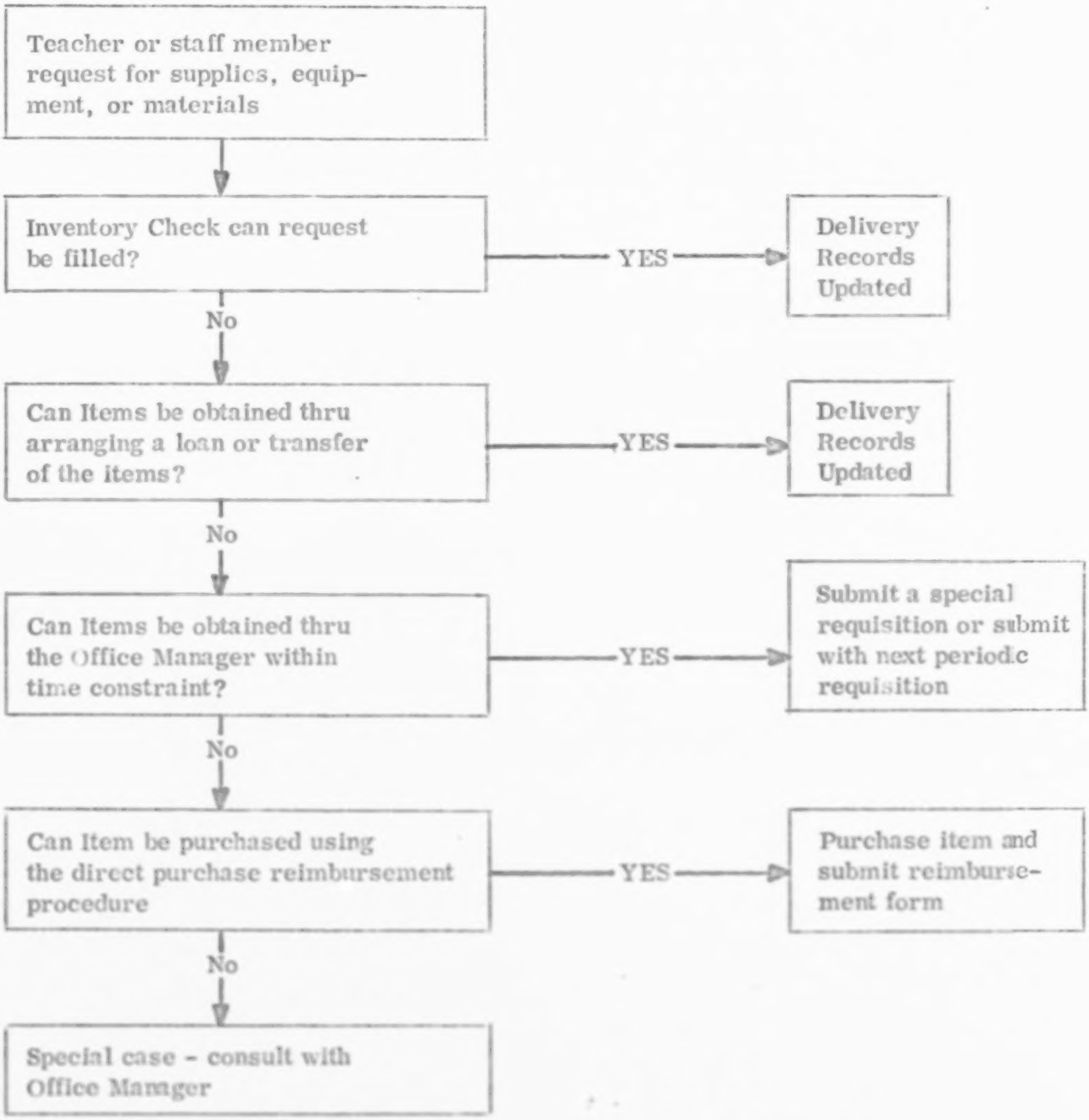

Teacher or staff member request for supplies, equipment, or materials
Inventory Check can request be filled?
YES
Delivery Records Updated
No
Can Items be obtained thru arranging a loan or transfer of the items?
YES
Delivery Records Updated
No
Can Items be obtained thru the Office Manager within time constraint?
YES
Submit a special requisition or submit with next periodic requisition
No
Can Item be purchased using the direct purchase reimbursement procedure
YES
Purchase item and submit reimbursement form
No
Special case - consult with Office Manager

Figure 3-25. Request Initiated by Teacher or Staff Member

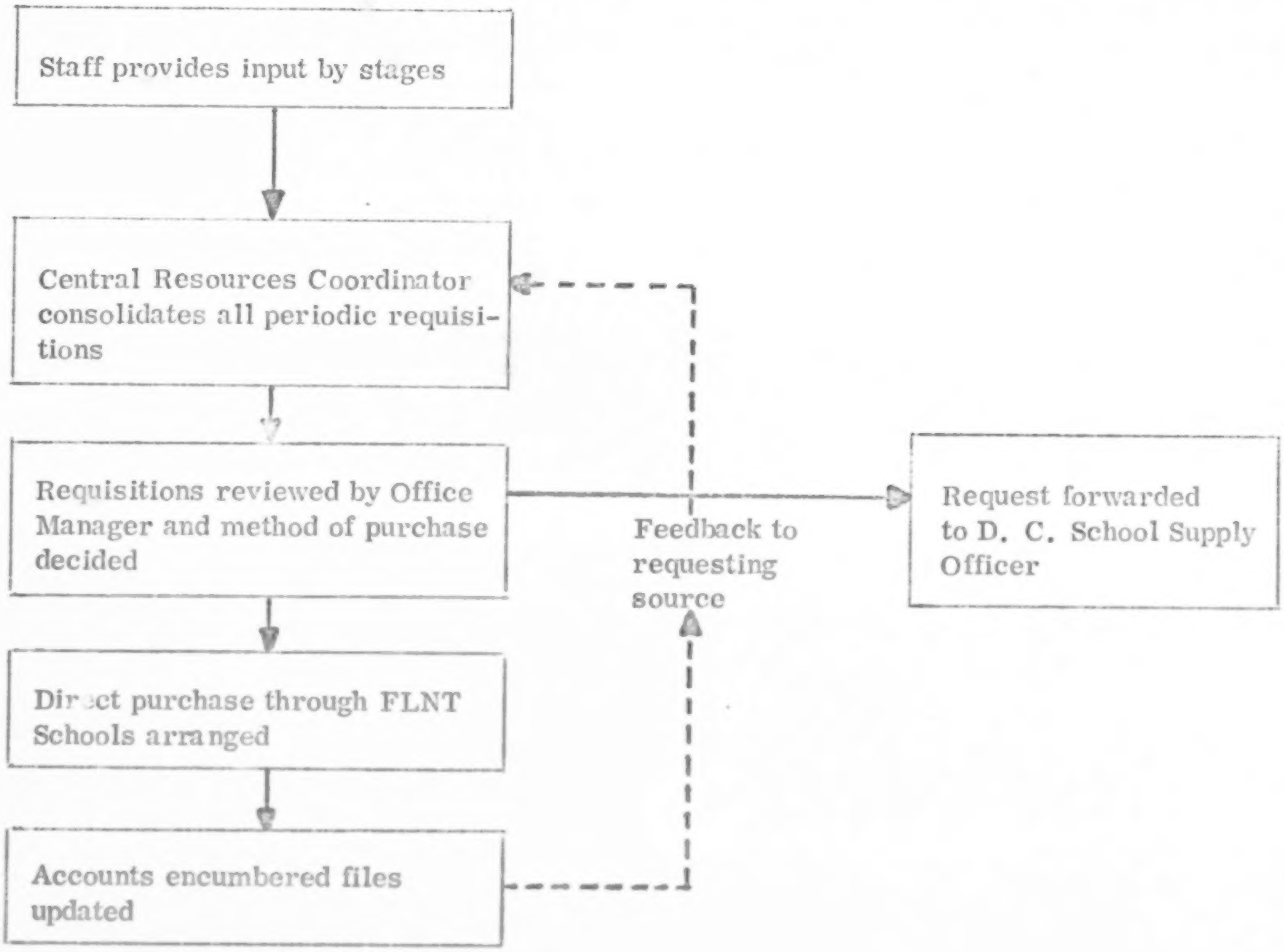

Staff provides input by stages
Central Resources Coordinator consolidates all periodic requisitions
Requisitions reviewed by Office Manager and method of purchase decided
Request forwarded to D. C. School Supply Officer
Feedback to requesting source
Direct purchase through FLNT Schools arranged
Accounts encumbered files updated

Figure 3-26. Periodic Requisitions

Figure 3-27 shows what happens to a periodic or special requisition when it is forwarded to the D. C. Schools.

3.9.3.1.2 Special Requisitions

Special requisitions will occur for several reasons, e.g., to purchase perishables or to meet unanticipated needs.

Special requests will be examined initially to determine the availability of requested items in the school inventory from records and visual identification. Availability implies that the item is contained in the inventory of the school and that the item is not reserved for a specific project or individual. The flow of a special requisition is depicted in Figure 3-28.

3.9.4 Requisition Forms

Requisition Form BR-1, Figure 3-29, is used for requesting items within the school from the central Resource Coordinator.

Form R-1, Figure 3-30, is used for requesting and authorizing the procurement of all supplies and equipment, either periodically or at special times. The last page of R-1 lists the requested item(s). Nomenclature and code data are contained in the Standard Schedule of Supplies of the D. C. School Catalog or the catalogs prepared for the Fort Lincoln School. Special requisitions will be accompanied by Form RJ-1, Figure 3-31, Special Requisition Justification.

Requisitions are submitted to the appropriate approving authority; a copy is retained by the central Resource Coordinator and the remaining copies are forwarded to the Office Manager. (The need for an approving authority between the originator and the Office Manager will be determined in Phase I of the training

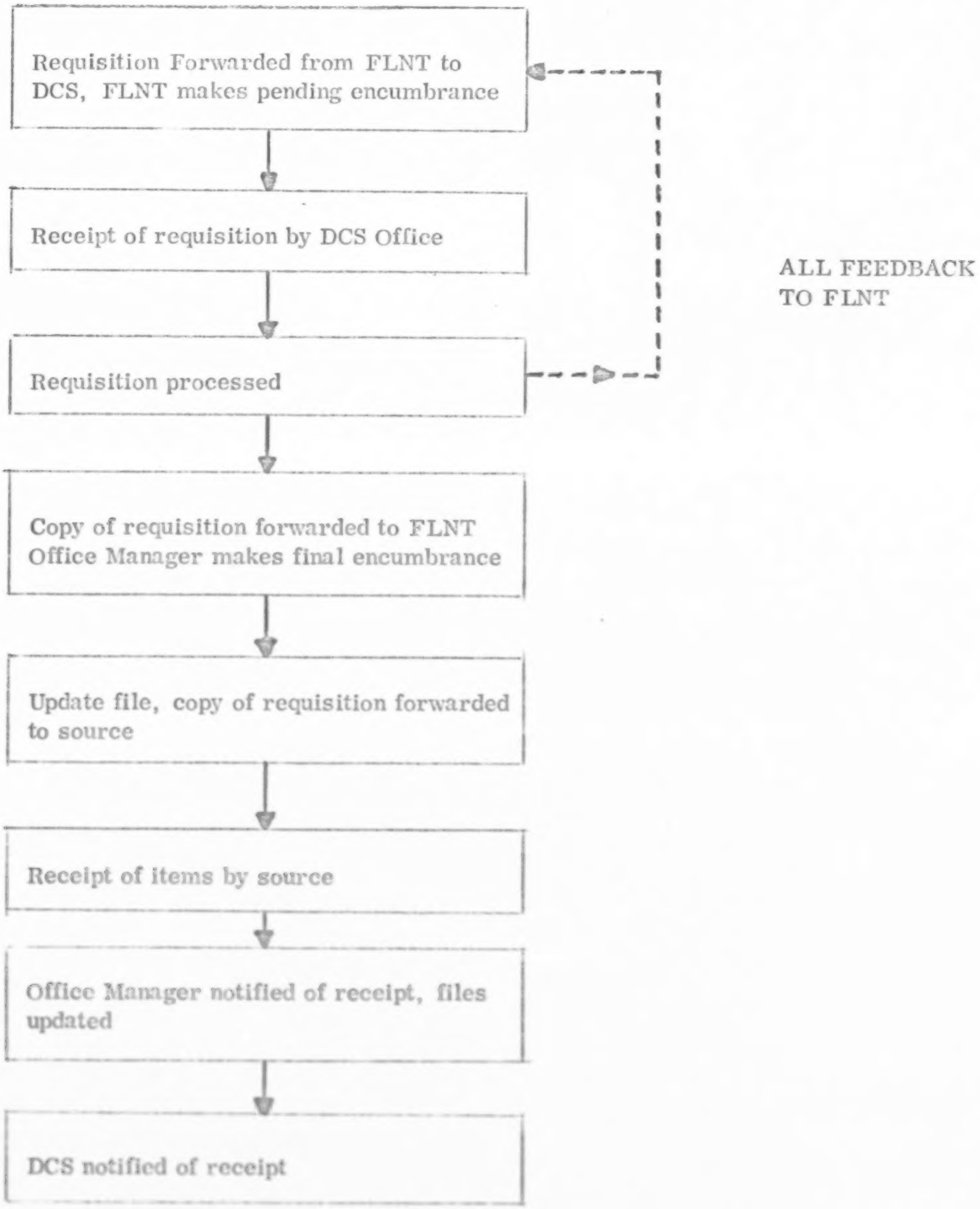

Requisition Forwarded from FLNT to DCS, FLNT makes pending encumbrance
Receipt of requisition by DCS Office
Requisition processed
Copy of requisition forwarded to FLNT Office Manager makes final encumbrance
Update file, copy of requisition forwarded to source
Receipt of items by source
Office Manager notified of receipt, files updated
DCS notified of receipt
ALL FEEDBACK TO FLNT

Figure 3-27. Requisitions Forwarded to D. C. Schools Supply Office

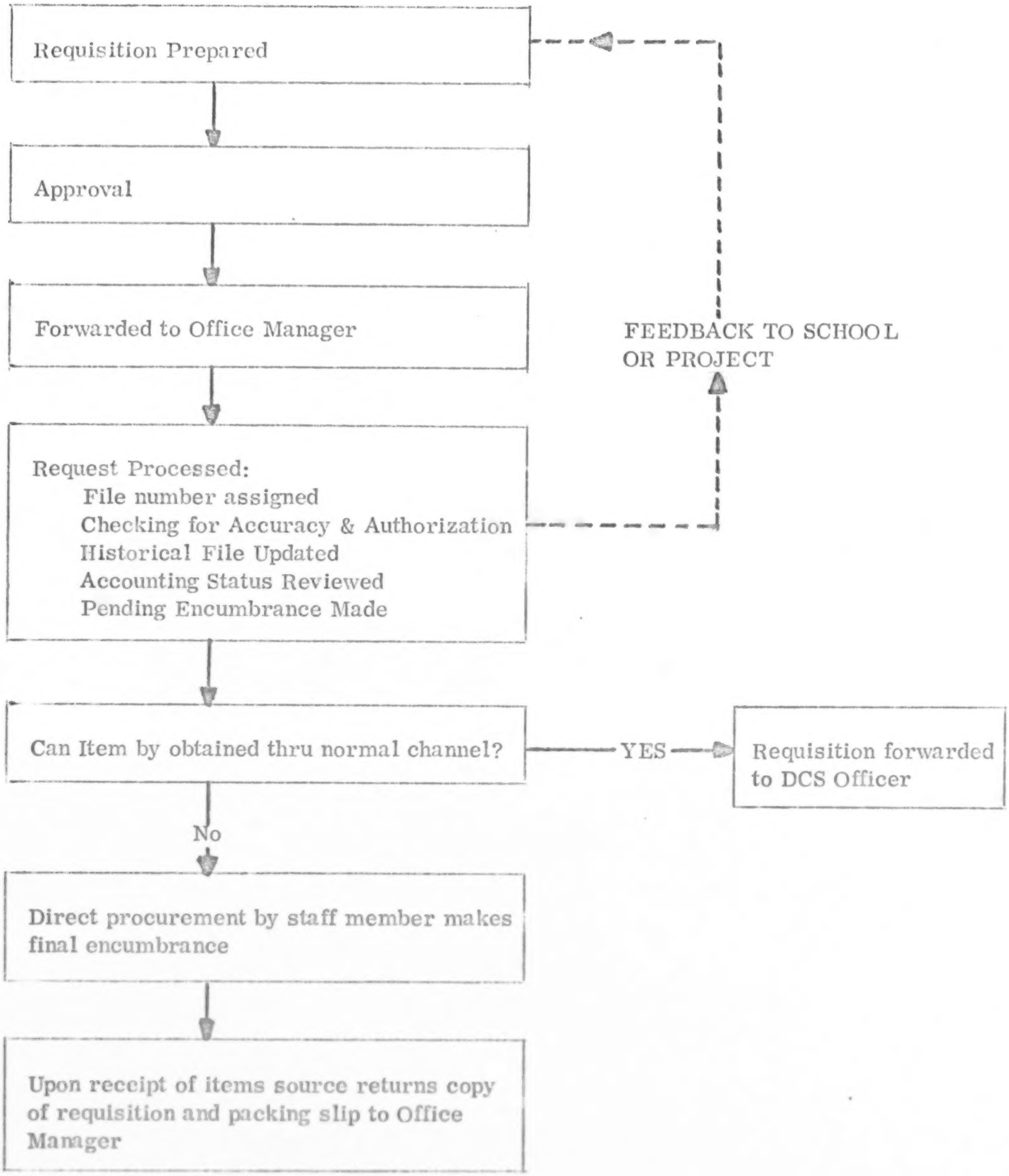

Requisition Prepared
Approval
Forwarded to Office Manager
FEEDBACK TO SCHOOL OR PROJECT
Request Processed:
File number assigned
Checking for Accuracy & Authorization
Historical File Updated
Accounting Status Reviewed
Pending Encumbrance Made
Can Item by obtained thru normal channel?
YES
Requisition forwarded to DCS Officer
No
Direct procurement by staff member makes final encumbrance
Upon receipt of items source returns copy of requisition and packing slip to Office Manager

Figure 3-28. Special Requisition

REQUEST FOR SUPPLIES, EQUIPMENT, AND MATERIALS

____
(Date)

FORT LINCOLN NEW TOWN

NOTE: Submit in duplicate. Original will be returned upon delivery of item(s). If delivery cannot be made as requested, you will be notified by the store clerk.

Please deliver the following item(s) to ____________________ on
(Place)

____________________.
(Date)

Requested by: ____________________
(Signature)

____
(Print Name)

Quantity	Item

Remarks:

Figure 3-29 Form BR-1

____
Date Prepared

FORT LINCOLN NEW TOWN

SPECIAL PERIODIC

REQUISITION

This form to be used for ordering all supplies and equipment. Circle appropriate application.

Prepare in Triplicate. Note: Special Requisition must be accompanied by FLNT Form RJ-1 (Requisition Justification).

Retain one copy. Forward remaining copies to the Office Manager.

I HEREBY CERTIFY that the entries and computations on the following pages are correct.

______________, 19___ ______________
Authority

I HEREBY CERTIFY that the entries and computations on the following pages are correct, and the amount of materials ordered is within the allotment granted for appropriation.

______________, 19___ ______________
Office Manager

Figure 3-30 Form R-1

Form R-1 (continued)

Quantity	Unit	Nomenclature	Program	Object	Date Needed	Cost Per Unit	Total Cost

Form R-1 (continued)

FOR PERIODIC REQUISITIONS ONLY

Unencumbered Allotment for this Appropriation ____________________

Total of this requisition -------------------- ____________________

Amount Reserved for groceries, biological - specimens, flammable liquids, etc. ____________________

Date

SPECIAL REQUISITION

JUSTIFICATION

-- The form will accompany special requisition --

Item number and nomenclature should be shown with explanation of need.

Nomenclature	Reason for Need

Approved: ______________________
Authority

Figure 3-31 Form RJ-1

program.) The requisition is always completed by the originator of the request, even the student where appropriate.

3.9.5 Types of Procurement Methods

The following items are taken from the Department of Business Administration Operating Procedures Manual[6], and serve as useful guidelines to Fort Lincoln School personnel.

- Small Purchases - This method is used for open market purchases where the total cost per item is less than $100. This type purchase is limited to the metropolitan area and delivery is usually possible at the time of purchase or shortly thereafter.
- Single Letter Quotation - This procedure is used for open market purchases from a single vendor of items whose total cost is less than $500. Processing of the requisition and quotation requires approximately 15 days and delivery time will be established by the vendor to whom the award for purchase is made.
- Three Letter Quotation - This method is used for open market purchases and is addressed to at least three (3) vendors for items whose total cost is between $500 and $2,500. The processing time is approximately 20 days. Delivery time is dependent upon the response time offered by the lowest successful

---

[6] Operating Procedures Manual, Department of Business Administration, September, 1969.

bidder. Generally, this requirement is part of the request for quotation.

- Bid Invitations - This procedure is used for making open market purchases where total costs of similar items exceed $2,500. Although individual items may cost as little as $5, an accumulation of like items may require the bid process. Bids are prepared by the Supply Management Section, forwarded to the D. C. Purchasing Officer for approval and subsequent distribution to all bidders on the D. C. Procurement list. This method of procurement usually requires approximately 90 days from the preparation of the bid to the delivery of the goods purchased.
- Federal Contracts - These are contracts negotiated by the General Services Administration and used where items desired by the school system are available. Items purchased are obtained from local dealers if possible. The processing through delivery time is approximately 90 days. There are no limitations on the use of Federal contracts.
- General Services Administration Contracts - These are contracts of general items maintained in GSA stock warehouses. This method of procurement is used when items are available from warehouses in which the school system is interested. There are no limitations on the use of these contracts. The processing through delivery time of any requisition is approximately 30 days.

Included on the next two pages are recent changes to the Operating Procedures Manual which indicate efforts being made within the D. C. Schools to reinforce the direct purchase option.

Change No. 2
2/1/70

TRANSMITTAL

This Department of Business Administration Operation Procedures Manual is intended to implement and amplify the policies and general regulations adopted by the Board of Education. Included are detailed regulations and procedures to assist and inform the operating officials requiring services and support from the Department of Business Administration.

I. Updating of Manual - This manual represents an attempt to compile and explain the several procedures and regulations relating to the services performed by the Department of Business Administration. Each chapter is concerned with specific services provided by the department and has its own separate paging arrangement to facilitate updating. Of necessity, the manual will require revision from time to time. If the revision is minor and relates to a change in occasional words, a notice will be sent to all operating officials indicating such change. When entire sections or paragraphs are changed, substitute pages will be sent to each official. It will be the responsibility of all operating officials to maintain the manual in its current state. The functioning of the Department of Business Administration will be enhanced, thus improving services, when these procedures are followed. Failure to do so will very often reduce the effectiveness of the department to provide the services requested.

II. Applicability of Manual - The regulations and procedures contained in this manual are applicable to all business transactions relating to the use and/or control of public school resources exclusive of Buildings and Grounds. Excluded are local funds retained by the individual schools. Since this manual is intended for system-wide use, comments and suggestions for improvement are invited. It is anticipated that as experience grows with the use of this manual and operating officials become more familiar with it, changes will be necessary.

III. Coding - The numbers in the upper right corner of each page indicate the general references to the policies and general regulations manual to be issued for system-wide use.

Acting Superintendent of Schools

Deputy Superintendent for Instruction

3.30 Requisitioning Procedures

Substitute the following paragraph:

(8) Direct Purchases - To ensure effective support for demonstration type instruction, school principals and teachers have the authority to make direct purchases of selected items. Direct purchases may be accomplished by either the individual making payment to vendor, or if vendor allows, by item being furnished to individual without immediate payment. If individual pays for item, the receipt and form D.C. 106 should be forwarded to the Accounting Office. If vendor furnishes item without payment, then invoice together with FSEA-10 should be forwarded to Supply Office for handling. The following items are covered by this provision:

FUNDS FOR DIRECT PURCHASES MUST BE RESERVED BY PRINCIPAL FROM ALLOTMENT "A" (THE INITIAL ALLOTMENT) TO THE SCHOOL, AND MUST BE STATED ON YOUR ALLOCATION AND DISTRIBUTION FORM UNDER THE SUBJECT AREA AFFECTED. A CURRENT COPY OF THIS FORM MUST BE ON FILE IN THE BUSINESS OFFICE.

(a) Food, wax paper, and aluminum foil, cleaners and detergents for demonstration and instructional purposes in home economics classes. The amount may not exceed $75.00 per month for each teacher of home economics.

(b) Biological specimens, prepared microscope slides and radioisotopes for the instruction of science may be purchased but not to exceed $35.00 per month for each teacher of science.

(c) Flammable solutions not to exceed $10.00 a month for each teacher of industrial arts and vocational education subject may be purchased.

(d) Teachers of music, physical education, and languages are authorized to purchase phonograph records and sheet music for instructional purposes at a rate not to exceed $50.00 per month per teacher.

3.9.6 Inventory Control

The central Resource Coordinator will be responsible for maintaining an inventory of supplies, equipment, and materials for the First Facility.

The Supply Inventory Card (see Figure 3-32) will be used to record the transactions described below. Each transaction will be recorded on a separate line.

- The date of the transaction will be recorded in Column A.
- Receipt of supplies
  - The receipt of supplies will be recorded by entering the quantity received in Column B.
  - The school file number of the requisition used to request the supplies will be recorded in Column F, under Remarks.
- Physical Inventory
  - Column C will be used to record quantity data resulting from physical inventories. Physical inventories will be required in the following situations.
    - During the second month of each school year, all items must be inventoried.
    - Following theft, vandalism, and/or damage, all items will be inventoried.
  - Column D will be used to record data which will indicate the quantity disbursed or disposed of during the period following the previous physical inventory. The number to be recorded will be calculated as follows: add all entries in Column B that have been recorded subsequent to the previous inventory to the previous amount on-hand (recorded as a result of the previous inventory). From this total, subtract the on-hand quantity as determined by the current physical inventory. Record the results in Column D.
  - Column F will be used to record the purpose of each physical inventory.

Code:

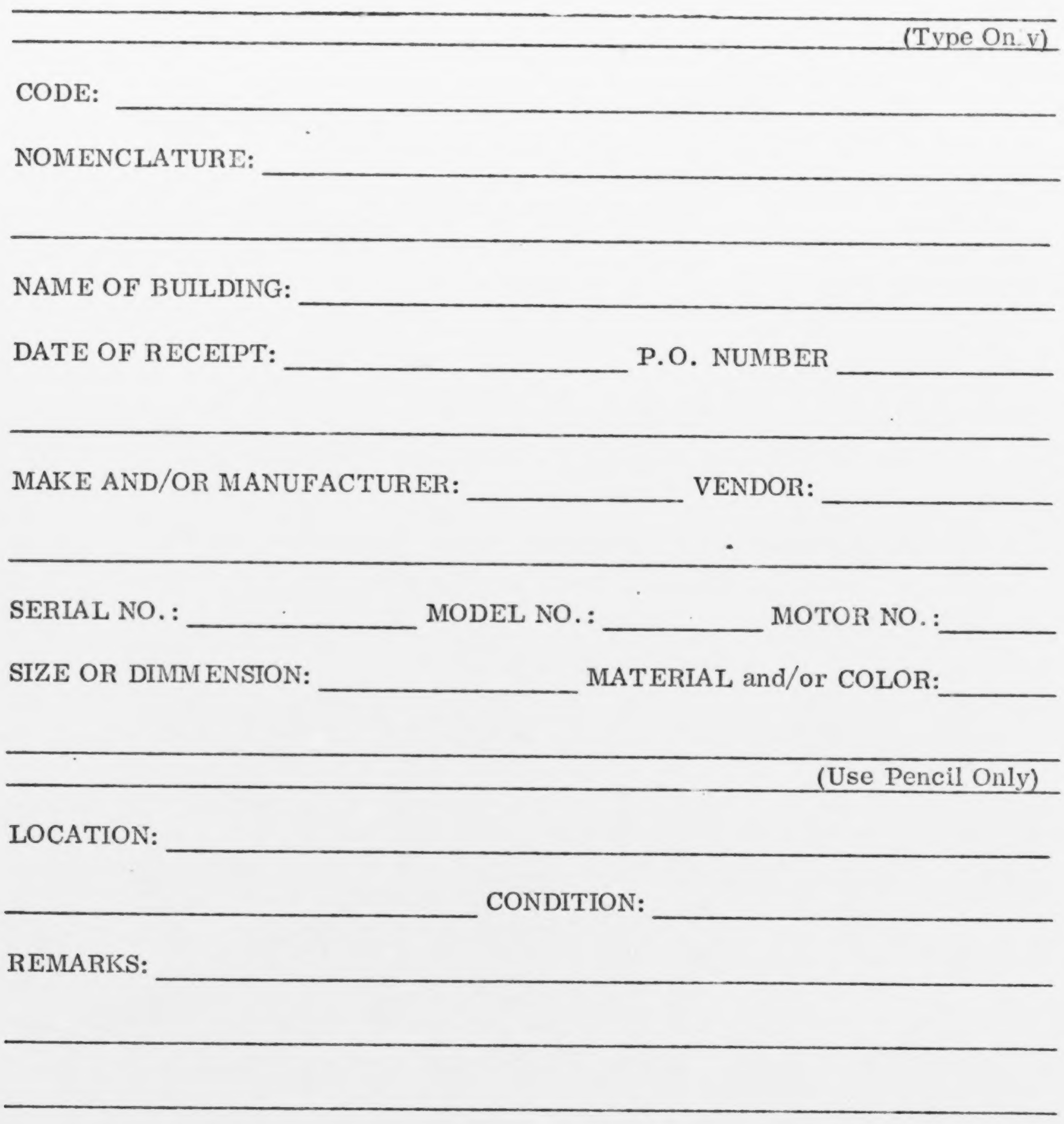
Nomenclature:

Date A	Received B	On-Hand C	Disbursed D	On-Order E	Remarks F

Figure 3-32 Supply Inventory Card

- Ordering Supplies
  - The quantity ordered will be recorded in Column E.
  - Column F will be used to record the school file number of the requisition.

A perpetual inventory of equipment will be maintained. An illustration of an Equipment Property Card is provided (Figure 3-33). A separate card will be filled out for each piece of equipment in the school and the cards will be filed alphabetically. An Equipment Inventory Card (Figure 3-34) will be placed in front of each group of property cards which relates to the same type of equipment. For example, if a school has 20 sewing machines, there would be a group of 20 property cards for this type of equipment. In front of this group of cards would be an Equipment Inventory Card that will be a different color than the property card so that it can be located easily. The Equipment Inventory Card is similar to the Supply Inventory Card. The code and nomenclature of the equipment are contained in the heading. More specific identifying data will be contained on the property cards. Each transaction will be recorded on a separate line and the date of the transaction will be indicated in the first column. The Equipment Inventory Card is not intended as a control card; therefore, location or assignment will not be indicated on the card and there is no need for disbursement data. The number of borrowed items in the school will be noted in Column C, and the number of items on-loan will be recorded in Column F. Appropriate remarks will be entered in Column J. Column G will be used to note equipment which is on-hand but is not usable. Column H will be used to indicate the number of items not in use. This number will not include those items which are unusable or on-loan. Column I will



____

______________________________________ (Type Only)

CODE: ______________________________________

NOMENCLATURE: ______________________________

____

NAME OF BUILDING: ___________________________

DATE OF RECEIPT: _______________ P.O. NUMBER __________

____

MAKE AND/OR MANUFACTURER: __________ VENDOR: __________

____

SERIAL NO.: __________ MODEL NO.: ________ MOTOR NO.: ______

SIZE OR DIMMENSION: ____________ MATERIAL and/or COLOR: ______

____

______________________________ (Use Pencil Only)

LOCATION: __________________________________

____________________ CONDITION: ________________

REMARKS: ___________________________________

____

____

Figure 3-33 Equipment Property Card

Code:

Nomenclature:

Date A	Received B	Borrowed C	On-Hand D	On-Order E	On-Loan F	Not Usable G	Not in Use H	Adjustment I	Remarks J

Figure 3-34 Equipment Inventory Card

be used to indicate adjustments resulting from theft, vandalism, transfer, or the retiring of equipment.

The central Resource Coordinator will be responsible for the following:

- Receipt and disbursement of supplies, equipment, and materials. The original requisition should be checked to determine whether an item has been ordered for a specific purpose; any necessary comments to this effect should be noted on the inventory record.
- Assisting the Office Manager with the initial preparation of inventory records.
- Adding new records as new items are added to the inventory of the School. Copies of the inventory file will be submitted periodically to the Office Manager.
- Aiding staff in the preparation of periodic and special requisitions. A copy of each request originating in the school should be filed. This copy will be used to "follow up" requests and check incoming supplies, equipment, and materials.
- Determining the availability of items requested by staff in the inventory of the school from the inventory records and visual identification. If the item is available and is not reserved or authorized for limited distribution by the principal or project leader, the inventory record will be updated and delivery will be made.

3.9.7 Standard Materials Lists

Beginning with the recommended list of supplies and equipment provided in the Education Plan, a series of standard materials lists should be prepared in which the experiences of Fort Lincoln School personnel and personnel of the D. C. Schools should be utilized. The lists would effect economy through bulk ordering, standardize materials, and facilitate ordering.

The compilation of these lists should begin after school opens, be updated annually, and constantly evaluated and revised. They should include the following entries, among others, grouping items with similarities:

- Item description
- Catalog reference
- Units available
- Unit price
- Units desired
- Totals

3.9.8 Implementation

In order for the system described here to work effectively, the following steps must be completed:

- These procedures and forms must be reviewed and refined by D. C. schools, Special Projects, and GLC personnel on a team basis.
- Form design must be completed and forms reproduced.

- Preservice training for all staff members in carrying out procedures must be completed.
- Procedures must be established for the expenditure of discretionary and controlled funds by teachers and students.
- Guidelines for the control of equipment taken home by students and teachers must be established.
- The utility of the requisition as a basis for a purchase order must be examined and modified where necessary.
- Procedures for the direct expenditure and reimbursement of cash must be established.

3.10 Accounting System

This section describes a fiscal accounting system which will provide the Fort Lincoln School with a useful tool for managing educational programs. An accounting system is necessary to monitor activities and to relate costs to educational performance measures. Long-range planning depends upon knowing the relationship of efforts to achievement. The ability of Fort Lincoln personnel to evaluate their efforts and to use this evaluation as a springboard for long-range planning should increase their flexibility and strengthen the foundation of the operation.

3.10.1 Purpose

An appropriate accounting system should show allotments, obligations, and expenditures in ways which will be useful for a variety of control and management purposes. For example, it is necessary to develop financial status reports for the basic purpose of control, both for Fort Lincoln and the D. C. Schools. That is, once allotments have been established, procedures must be established to make certain that funds are being spent for the purposes intended, when these purposes have been specified. It may also be desirable to make comparisons between the resources allocated to different programs. When an administrative system is operating adequately, it would be reasonable to expect that a comparison of costs allocated to different programs over a period of time could be produced. A decision about the redirection of efforts among stages, or functions, as an example, requires knowledge of the past resources expended for these programs in relation to the number of students affected by each program.

The financial accounting system is designed to provide the Fort Lincoln staff with comprehensive information for control of expenditures and for educational decision making. The system should permit an analysis of the relationship between stated objectives of the school and the resources which have been allocated for the attainment of the objectives.

Specifically, the accounting system is designed to provide periodic status reports of allotments, obligations, and expenditures for the total Fort Lincoln operation and individual programs. (See Section 3.11.)

3.10.2 Accounting Structure

The FY '70 budget for the D. C. Schools included a discussion of the possibility of building a Program-Planning-Budgeting system into the budget operation. It is hoped that aspects of the accounting system developed here will support a PPB system. It should be emphasized that data organized using the PPB system can serve the educational decision-maker in planning. A PPB system is a tool which can be used to make more informed and intelligent decisions about the future. Its usefulness depends upon appropriate organization of program data.

The current conventional practice in public schools is to use the Federal Accounting System to prepare budgets and related accounting systems by activity and object as it is currently done in the D. C. Schools. The information generated is appropriate for control purposes, for observation of trends, and for some broad types of evaluation such as the adequacy of provisions for building maintenance over a period of time. Generally, program reporting has not been developed. However, proper application of the Federal Accounting System can provide cost data about specific curriculum programs.

Currently, the public school administrator uses a simplified fiscal accounting model (see Figure 3-35) to examine fiscal activities, e.g., to compare funds budgeted and spent for administration (total row A) to funds budgeted and spent for instruction (total row B). He may compare expenditures for instructional supplies (face B-II) and instructional equipment (face B-III), or salaries for administration (face A-I) and salaries for instruction (face B-I).

The combinations of information which can be obtained are limited only by the classification scheme which is devised for the codes. Therefore, it is necessary to assign codes as the budget is being prepared. This can be facilitated if the school administrator and his staff specify in advance the information they wish to obtain.

The addition of program codes will permit comparisons of expenditures for efforts such as:

- Total General Administration (entire slice a) and total Staff Development (entire slice d)
- Total instructional cost for Stage II (slice c of entire row B) and total instructional cost for stage I (slice b of entire row B)

The newly modified D. C. Charter of Accounts will be used as the framework for activity and object accounting. Whether the activity and object classifications are adequate for program accounting can be decided after the system is used for a period of time. One of the objectives of this proposal is to develop an understanding of the purposes of an accounting system and the powerful tool it can provide management.

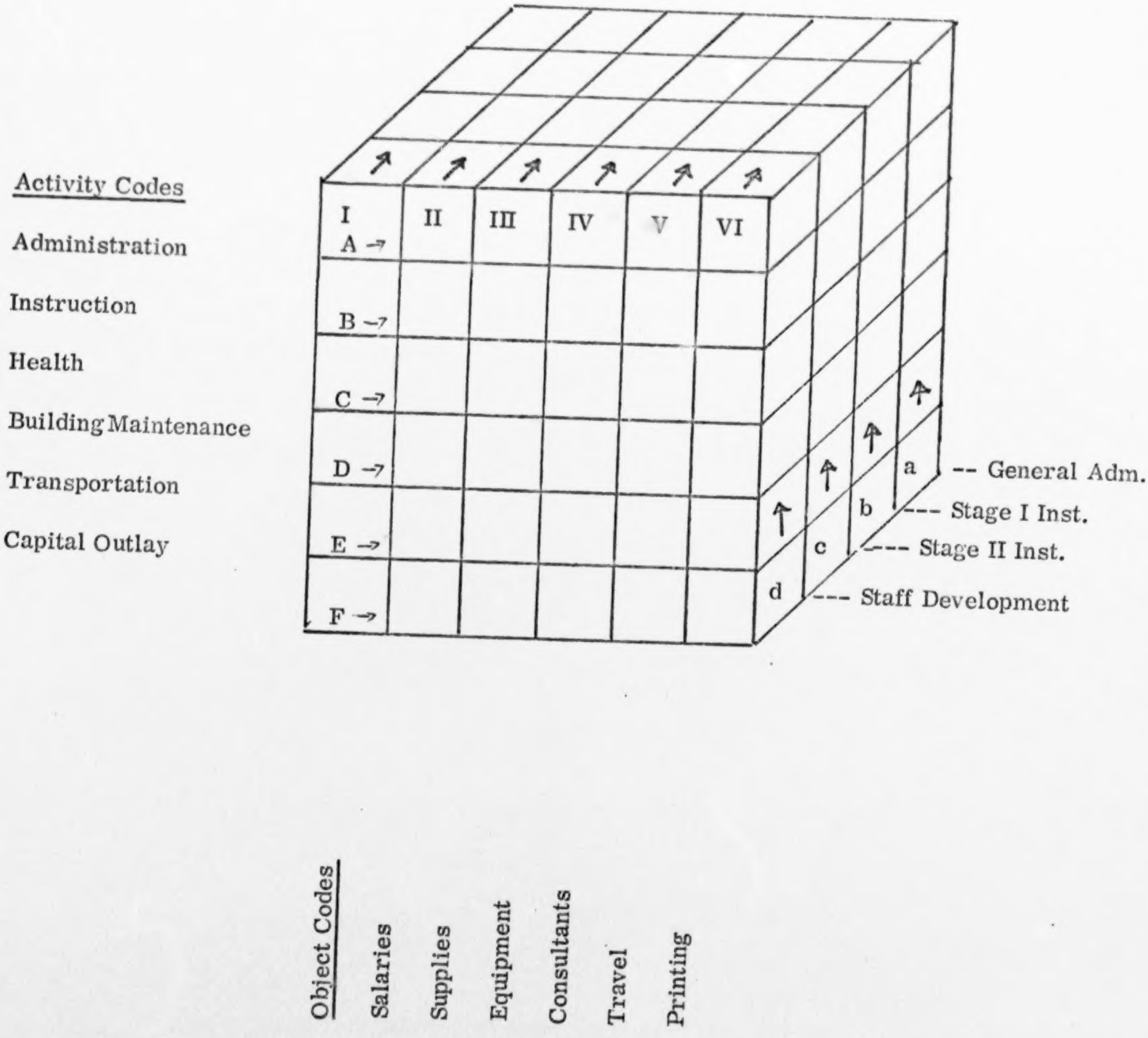

Activity Codes
Administration
Instruction
Health
Building Maintenance
Transportation
Capital Outlay
I
II
III
IV
V
VI
A →
B →
C →
D →
E →
F →
a
b
c
d
-- General Adm.
--- Stage I Inst.
--- Stage II Inst.
--- Staff Development
Object Codes
Salaries
Supplies
Equipment
Consultants
Travel
Printing

Figure 3-35 Fiscal Accounting Model

3.10.3 System Inputs

The sources of input to the accounting system will be the control allotments received from the D. C. Schools, the requisition (in some cases the purchase order) which has gone through the procurement process, and the invoice which is forwarded through the procurement system. For personnel transactions, the source of input will be a card containing all pertinent information about each staff member.

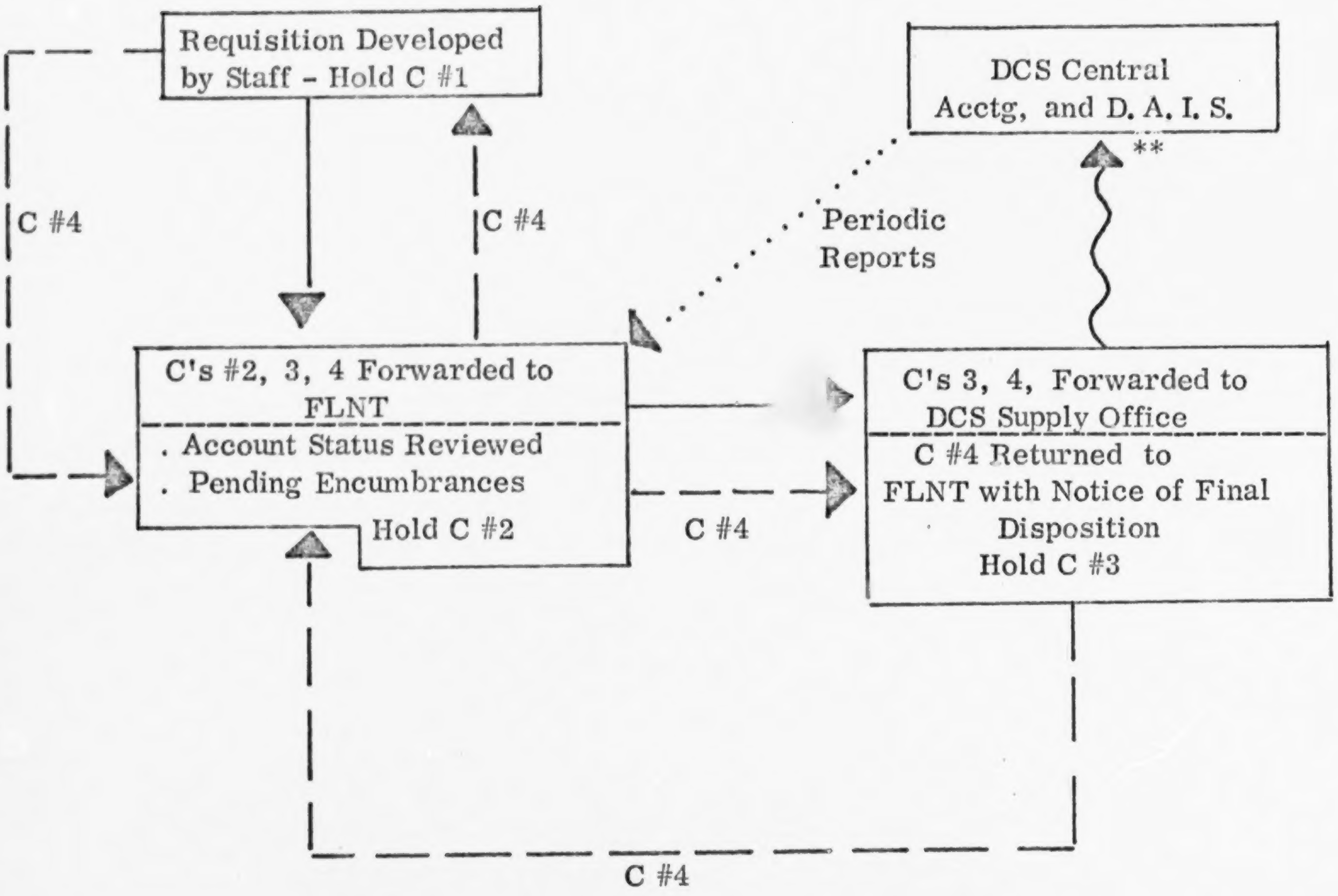
3.10.4 Procurement

The information flow from procurement to Fort Lincoln School accounting is based upon the assumption that the D. C. Schools' central office will continue to disburse funds for the Fort Lincoln School.

The Fort Lincoln School staff must be certain that accurate and comprehensive information regarding requisitions is entered into its accounting system. Therefore, when the D. C. Supply Officer has reviewed all Fort Lincoln requests which flow from the Office Manager, and feeds back data pertaining to the disposition of these requests, the Office Manager must provide Fort Lincoln personnel with appropriate information for account encumbrances. This requires that the information flowing between the central office of the D. C. Schools and the Fort Lincoln office accurately reflects the final disposition of requests with all the appropriate coding.

Figure 3-36 is a sample flow chart displaying the flow of forms for recording financial transactions of purchases made through the D. C. Schools.

For FY '71, the Fort Lincoln School staff should maintain a manual accounting system which should be developed into an automated system after its


Requisition Developed by Staff - Hold C #1
DCS Central Acctg, and D. A. I. S.
C #4
C #4
Periodic Reports
**
C's #2, 3, 4 Forwarded to FLNT
. Account Status Reviewed
. Pending Encumbrances
Hold C #2
C's 3, 4, Forwarded to DCS Supply Office
C #4 Returned to FLNT with Notice of Final Disposition
Hold C #3
C #4
C #4

*C #4 may replace the "floater" copy currently used by the D. C. schools' Central Office when purchased goods are sent directly to the requesting source.

**This flow should be designed for the needs of the D. C. schools' Central Office in recording transactions in the central accounting system.

Figure 3-36 Requisition Flow - For Purchases Through D. C. Offices

efficiency and utility have been established. Detailed records will be maintained at the stage level, with entries made by various staff members. The principal responsibility of the central administration will be for consolidating and centralizing records.

The design of procedures will require inputs from all levels in the system. Teachers will be expected to account for all their fiscal transactions, and to make purchases using discretionary funds. In addition, students will be allowed to execute and keep track of some financial activities, such as the purchasing of and accounting for supply items. Initial recording and control of all transactions will be kept at the level of their execution.

Maintenance of an accounting system as described will result in displays of information available on a periodic and demand basis for control and monitoring purposes. The format will be useful for program accounting within Fort Lincoln and will also be compatible with D. C. School requirements.

3.10.5 Responsibilities

The overall administration of the accounting system for the Fort Lincoln School is the responsibility of the Administrative Coordinator. The daily operations will be managed by the Office Manager, who will delegate responsibility for maintaining records to one of the clerks in the central office. Stage level accounting will be done by a paraprofessional designated by the stage representative. The principal responsibility of this paraprofessional will be to supervise the accounting entries made by students and staff, and to collate all data relating to stage level accounting. The stage representative will be responsible for submitting required periodic and special reports to the Office Manager. A broad description of responsibilities is displayed in Figure 3-37.

There are two principal sources of entry into the account books: annual transactions regarding personnel and materials, which will be the immediate responsibility of the Office Manager; and the daily transaction, which will be the responsibility of paraprofessionals and the stage representative.

3.10.6 Document Coding

All financial transactions must be recorded in such a way as to be useful to the accounting system. Proper coding must be shown on all requisitions, travel requests, direct payment invoice, or any other documents requiring funds.

The current coding system for the D. C. Schools, derived from the D. C. Charter of Accounts, provides a rather complex system of numerical coding for transactions. Beginning in FY '70, the system will provide information related to specific programs.

Complexity of coding does not automatically provide for information useful to program analysis nor does it preclude useful program accounting. However, the complexity cannot be removed if the system proposed for the Fort Lincoln Schools is to be compatible with the requirements of the D. C. Schools and Government. The components of the system proposed for the D. C. Schools, for FY '70, and which will be used in the Fort Lincoln Schools, are as follows:

1 2	3 4	5 6 7 8	9 10 11	12 13 14	15 16	17 18
0 0	0 0	0 0 0 0	0 0 0	0 0 0	0 0	0 0
Agency	Fiscal Year	Funds	Allotment	Activity	Object	Sub-Object

- The first two digits refer to the agency processing the document, and 10 is used for the public schools.

PERSON/FUNCTION FLOW CHART

Complements flow charts displayed in discussion of Procurement Process.

Overall Responsibility: Administrative Coordinator

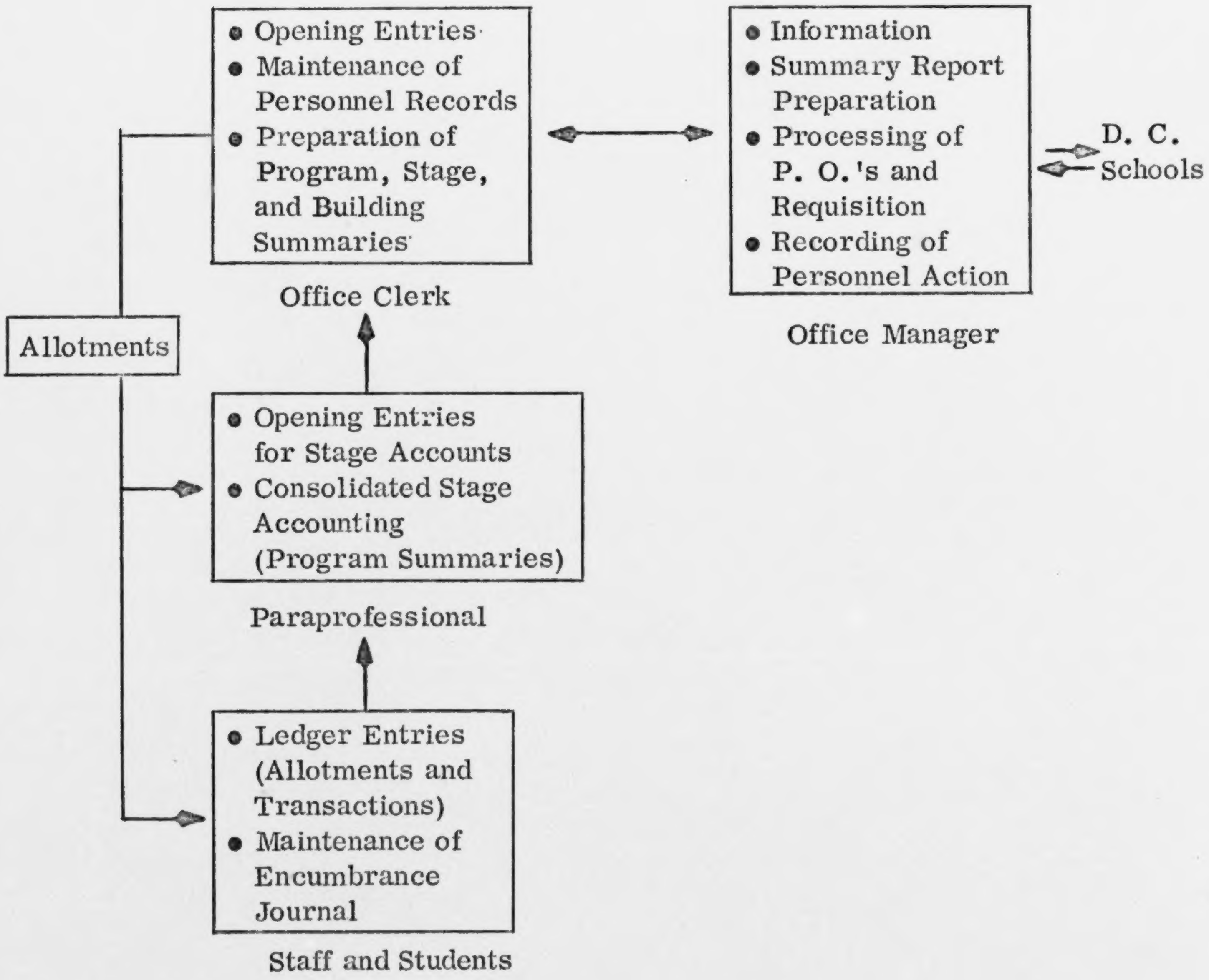

• Opening Entries
• Maintenance of Personnel Records
• Preparation of Program, Stage, and Building Summaries
Office Clerk
• Information
• Summary Report Preparation
• Processing of P. O.'s and Requisition
• Recording of Personnel Action
Office Manager
D. C. Schools
Allotments
• Opening Entries for Stage Accounts
• Consolidated Stage Accounting (Program Summaries)
Paraprofessional
• Ledger Entries (Allotments and Transactions)
• Maintenance of Encumbrance Journal
Staff and Students

Figure 3-37

- For fiscal year coding, the last two digits of the normal year designation are used.
- Digits 5 - 8 are used to designate the source of funding, and 9011 will be used for all Fort Lincoln School purposes to indicate that the funds are administered through the D. C. Schools. In this way, Fort Lincoln School costs can be separated from the costs of the rest of the D. C. system, while using the same basic accounting codes as that system.
- Digits 9 - 11, the allotment code, indicate the primary control established or the program code, and the source of funding. For example, the following digits in the 9 - 11 position would have the following meanings:

  8 01 Administrative Services, District Funds
  Adm. Ser. Dist. Appropriation

  5 01 Boy's Junior-Senior High School
  Spec. Ed. Dist. Appropriation

  8 11 Buildings and Grounds, Dept. Office Impact Aid
  Adm. Ser. Impact Aid

  The allotment code is presented in detail at the end of this section.
- Digits 12 - 14 are used to designate the program category to which the transaction should be charged. For example, the following are some actual examples:

03E	Pre-kindergarten
13B	Project Read-Secondary
16A	Capitol Page School

It is apparent that the immediate difference in codes for elementary and secondary schools is the first digit. In this case 0 is always used as the first digit in the program category code to designate elementary schools, while 1 is always used as the first digit to designate secondary schools.

The program category codes are listed in detail at the conclusion of this section.

3.10.7 Procedures

3.10.7.1 Ledger Production

The first procedure in establishing appropriate records is to set up the account ledgers according to program. Several steps are required.

- Opening entries must be made to identify source of funds and program allocations (Form A-1, Figure 3-38). The information is transferred from the coded allotments received from the D. C. central office. (See Midterm Report, Volume III, Funding Plan, p. 6-6.)
- Development of a separate folder for each program, containing the following:
  - Program description taken from control allotments to show all appropriations (Form A-2, Figure 3-39).

Form A-1

FORT LINCOLN NEW TOWN
Opening Entries
F.Y. 1971

Date	Account Description	Amount	
7/1/70	Direct Funding - D.C. Schools (assume)	$1,025,180	
	• General Administration		$127,490
	• Instruction		
	• Stage I		$163,850
	• Stage II		$199,260
	• Stage III & IV		$239,820
	• Staff Development		$ 32,490
	• Community		$262,270
		$1,025,180	$1.025,180

Figure 3-38
3-114

Form A-2

FORT LINCOLN NEW TOWN
Program Description
F.Y. 19___

Program Title: General Administration

Total Allotment ______________

Category	Allotted	Activity	Object
PERSONNEL	$ 62,520	04C	11-11*
OFFICE EQUIPMENT	$ 3,600	04C	31, 32*
OFFICE SUPPLIES & MATERIALS	$ 800	04C	26-88
COMMUNICATIONS, PRINTING, FACILITIES	$ 3,250	04C	24-51
TRAVEL	$ 1,660	04C	21-13
CONSULTANTS & CONTRACTS	$ 40,000	04C	25-31
OPERATIONS AND MAINTENANCE	$15,860	04C	26-11
TOTALS	$127,490		

* to be broken down into further object, sub-object

Figure 3-39

- Encumbrance journal containing entries taken from the requisition, purchase order, and personnel back-up sheets; entries are made within each program in chronological order by vendor (Form A-3, Figure 3-40).
- Account ledger sheets within each program to show allotments by activity and main object (Form A-4, Figure 3-41).

Figures 3-42 to 3-46 are sample forms and procedures in which it is assumed that the following transactions were developed by the Fort Lincoln School office for the General Administration of the facility.

P.O. #3924, dated 10/04/70; Order placed with I. J. Hammett for:

1 Desk Calculator for Administration	@$770.00
12 Cartons Duplicating Paper for Admin.	@$ 30.00
1 Duplicating Machine for Administration	@$430.00

Form A-3

FORT LINCOLN NEW TOWN
Encumbrance Journal
F.Y. 1971

Program Title: General Administration

Date	Document	No.	Vendor/ Payee	Item	Activity	Obj.	Enc.	Date	Pay't	Date
Sept.										
Oct.	Purchase Order	3924	I. J. Hammet	Desk Calculator	04C	31	770	10/4	693	10/20
				Duplicator Paper	04C	26	30	10/4	30	10/20
				Duplicator Machine	04C	31	430	10/4	390	10/20

Figure 3-40

Form A-4

FORT LINCOLN NEW TOWN
Account Ledger
F. Y. 1971

Program Title ______________________

Budget Code (Main Object) 26*

Activity 04C

Allotment $800

Source Document	Number	Object	Encumbrance	Unencumbered Balance	Expenditure	Cash Balance
Purchase Order	3924	26-88	$30	$770	$30	$770

*Charges to sub-objects will be shown within the ledger

Figure 3-41

Form A-4

FORT LINCOLN NEW TOWN
Fixed Costs
F. Y. 1971

Program Title General Administration

Activity 04C

The following are constant figures. This account is for information only and will remain inactive.

Budget Code		Description of Account	Money Allocated
12		Personnel Benefits	
	11	Insurance (Group Life)	
	12	Health Benefits	
	13	Civil Service Retirement Contribution	
	15	Ritirement Contribution F. I. C. A	

Figure 3-42

3.10.7.2 Ledger Production for Personnel

Actions on recommendations regarding personnel result in Board Orders forwarded to Fort Lincoln School staff from the D. C. Board of Education. The Board Order is a standard form (see Figure 3-14)which presents the following information:

- Name of Appointee
- Classification (GAS or TSA)
- Specific Assignment (Program)
- Grade Level
- Location
- Salary
- Social Security Number
- Account Code (added for Fort Lincoln Schools)

If new assignments are made during the year, or if existing assignments are modified, notations are made on a file card provided for each Board Order. In this way information on total staff is updated continually. The individual file cards are maintained within Fort Lincoln School records according to particular programs. These cards provide all the information necessary to account for these personnel. The one shortcoming of the current D. C. System is that the data from the file cards are not organized to feed into an accounting system.

The only requirement for the production of periodic reports is to enter the data from individual cards onto personnel back-up sheets for each program. Preparing a single sheet for each object-sub-object classification by individual program will provide the inputs to be entered into the account ledgers. This consolidated information could also be used for the production of other types of reports. A sample of the personnel ledger is shown (Form S-1, Figure 3-43). A personnel back-up sheet is also presented (Form S-2, Figure 3-44).

The bulk of entries will be made before the start of the school year. Each position will be listed separately, and the ledger will be updated as Board Orders are required. The monthly entries to the program activity object sheets (PR-3, Figure 3-45) will be the sum total of the columns on the individual personnel ledgers. All entries will be for yearly contracted salaries (or fractions negotiated).

For the purpose of balancing all program totals, an account will also be kept for personnel benefits. However, the entries will be made on a yearly basis, since for the purpose of reporting, these figures will remain constant. This form will serve as the account ledger for personnel benefits, and is shown along with the other account ledger sample (Form A-4, Figure 3-42).

3.10.8 System Outputs

3.10.8.1 Periodic Reports

Samples of some periodic reports are presented. Although a sample of a consolidated report at the building level has not been shown, building reports can be produced by summing all activity and object transactions for each building across all programs, provided the appropriate building codes are entered into the account ledgers. The actual procedure does not differ from the steps required to produce individual program reports by activity and object.

3.10.8.2 Procedures

The reports are produced in reverse order from the sequence in which the forms are presented in this report. The individual summary reports for

Form S-1

FORT LINCOLN NEW TOWN
Personnel Ledger
F. Y. 1971

Program Title ______________________

Allotment ________________________

Position Class.	Number Allotted	Allotted Salary	Grade Level	Change Order + or −	Date	Adjusted Allotments		Salary Class + step	Contracted Salary	Unencumbered Balance
						Number	Salary			

Figure 3-43

Form S-2

FORT LINCOLN NEW TOWN
Personnel "Back-UP" Sheets
F. T. 1971

Program Title ______________________

Allotment ______________________

#	Position Grade — Title	Position Number	Grade Level	Allotted Salary	Name of Teacher/ Staff Hired	Salary Class & Step	Date Hired	Salary Paid

Figure 3-44

Form PR-3

Figure 3-45

FORT LINCOLN NEW TOWN

Monthly Program Report

Program Title General Administration

Month (Year) Ending January 31, 1971

Total Allotment $127,490

Object	Description	Allotment	Encumbered	Unencumbered Balance	Expenditure	Cash Balance
11-11	Personnel	62,520				
	-					
	-					
	-					
26-88	Office Supplies and Materials	800				
	-					
	-					
	-					
21-13	Travel	1,660				
TOTALS		127,490				

each program are first compiled for each program by object codes (Figure 3-45). The necessary consolidations then can be developed easily.

The data for the production of the reports come from the account ledger for each program.

Allotments, encumbrances, and expenditures are recorded in the account ledgers for a single activity and a single main object within each program (see Figure 3-41). The totals of each of these entries will be transferred to an individual Program Report Summary (Figure 3-45) on a monthly basis.

This form will be updated and distributed each month, showing year-to-date totals taken from the account ledgers. After the first month's activities are recorded, the transactions for each month thereafter will be added to the year-to-date totals.

The production of the report for total Fort Lincoln School control can be developed by consolidating the reports described previously. After all of the individual program reports are prepared, a consolidated report is then prepared for all programs by summing the like object, sub-object figures.

The production of the summary report for all programs (see Form PR-1, Figure 3-46) is achieved by adding all the totals on the bottom row for each program as presented in Figure 3-45. The summary report will be prepared each month showing the year-to-date totals.

The monthly reports, excluding the individual account ledgers, should be duplicated for distribution to all Fort Lincoln administrators and stage representatives, the accounting office of the D. C. Schools, and the budget office of the D. C. Schools.

FORT LINCOLN NEW TOWN
Monthly Report
All FLNT Programs

Month (Year) Ending ____________

Program Title	Allotment	Encumbered	Unencumbered Balance	Expenditure	Cash Balance
General Administration	127,490	105,000	22,490	101,000	26,490
-					
-					
-					
Instructional Stage 2	199,260	180,000	19,260	170,000	29,260
-					
-					
TOTALS	326,750	285,000	41,750	271,000	55,750

Figure 3-46

3.10.9 Implementation

Before the accounting system described here can be realized in the Fort Lincoln School operations, several steps must be completed:

- All forms and procedures must be reviewed and refined by the Special Projects Division in conjunction with D. C. Schools' personnel and General Learning Corporation.
- Forms and procedures must receive a final review and refinement in Phase I of the training program. (This might be updated by review by the Office Manager and Administrative Coordinator prior to the beginning of the training program.)
- Forms must be reproduced by the opening of school.

3.10.10 Additional Information

Additional information and forms required by the D. C. Schools are presented to provide broader knowledge of total D. C. School System operations. These are:

- Administrative Control of Appropriations and Allotments -- Budget Memo 69-7.
- Procedures on control of school funds (3400 series of D. C. Schools Department of Business Administration Procedures Manual).
- Report of School Funds -- Form 79a, Figure 3-47.
- Report of School Funds -- Form 492, Figure 3-48.

ADMINISTRATIVE CONTROL OF APPROPRIATIONS AND ALLOTMENTS

Budget Memo 69-7

This directive prescribes the policies and procedures for the administrative control of Appropriated Funds, Donations, Federal Grants and Departmental allotments. Its purpose is to (1) identify authority, (2) define terms used, (3) enforce discipline in financial management, (4) fix responsibility, and (5) describe procedure.

(1) Authority

The authority for these regulations is Section 3679 of the Revised Statutes, as amended by Section 1211 of the General Appropriations Act of 1951 (31 USC 665).

(2) Definition of terms

For purposes of this directive the following definitions will apply:

a. Appropriation. Funds authorized by the Congress and made available for obligations and expenditures. The term appropriation also means obligational authority. This is the authority to create obligations by contract in advance of appropriations. Appropriations are made to the District Government and a designated portion of the Appropriation allocated to the Public Schools.

b. Allocation. Funds authorized by the D.C. Government and made available for obligations and expenditure by the Public Schools.

c. Allotment. The amount of funds made available to each department, from all sources, for its use in operating approved programs. Departmental obligations and expenditures can be made from departmental allotments.

d. Obligations and expenditures. The financial liability incurred when a commitment is made to purchase goods or services or to acquire assets. Obligations are incurred whether or not invoices are received or payments have been made.

(3) Notification

Departmental allotments will be communicated to each department in writing at the beginning of the fiscal year or when funds are appropriated. Preliminary allotment, based on the request in the Mayor's budget will be forwarded to the departments, for purposes of planning, prior to the beginning of the fiscal year.

(4) Control of Allotments

It shall be the responsibility of the head of each department or organizational unit of the school system who receives allotments to assure that obligations or expenditures will not be in excess of amount specified in each such allotment. It shall be the responsibility of the chief administrative officer to maintain such records as are necessary for the proper control of such apportionments, and to provide such reports on the status thereof as will give him sufficient notice prior to the time the apportionment may be exceeded.

(5) Special Conditions

The departmental allotment will be apportioned into mandatory sub-allotments as follows:

1) Personnel compensation		$000,000
2) Personnel Benefits		000,000
3) Travel and transportation of persons:		
a) Local Travel	000,000	
b) Subject to limitation	000,000	
c) Not subject to limitation	000,000	
4) Rent, Communication, and Utilities		000,000
5) Printing and Reproduction		000,000
6) Other services		000,000
7) Supplies and Materials		000,000
8) Equipment		000,000
a) Textbooks	000,000	
b) Other	000,000	
Total allotment		$000,000

Department heads or program managers may not unilaterally transfer funds between sub-allotments. While control of the total departmental allotment is the responsibility of the department head as it relates to excess obligations, control of mandatory sub-allotments are required on a system wide basis. Therefore, any proposed transfer between mandatory sub-allotments must be approved by the Budget Department. A memorandum request to increase one account and decrease another must be submitted to and approved by the Budget Department before obligations are made.

The memorandum must show balances in the account to be decreased before and after the transfer, i.e.:

Account No.	Balance (date)	Increase	Decrease	New Total
Activity 310				
26 Supplies				
88 Office Supplies	15.00	100.00		115.00
24 Printing				
11 Printing forms	125.00		100.00	25.00

Account balances must be verified by the Accounting Department before requests are submitted to Budget.

(6) Allotment Distribution
Allotments will be distributed to each department by quarters, i.e.:

Object Title	Total	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.
XXXXXXXXXXXX	00,000	0,000	0,000	0,000	0,000

(7) Personnel Schedule. In addition to the allotment a personnel summary will be furnished each department head showing the following information:

Temporary employment	- Full-time positions established for a limited period of less than a year (or a position determined to be permanent but filled for less than a year, each year, due to the seasonal nature of the work.)
Part-time employment	- Employment in positions which require work on a prearranged schedule of hours less than 8 per day or work less than the prescribed 5 day work week for full-time employees in the same group or class.
Intermittent Employment (WAE)	- Employment of consultants and others in positions which require work on an irregular or occasional basis, with hours or days of work not based on a pre-arranged schedule, and with compensation only for the time actually employed or for services rendered.
Permanent Employment	- Positions established without time limit or for a limited period of a year or more, or which have been occupied for a year or more, regardless of the intent when established.

(8) Violations

The Budget Department shall prepare for the Superintendent a report of violations of requirements set forth in this directive.

The report shall be restricted to a statement of all the pertinent facts, including, but not limited to the following:

a. The fund accounts involved.

b. The amount of authorization to over obligate, over obligation, and/or over expenditure.

c. Unapproved transfers between mandatory sub-allotments.

d. Name and position of person responsible.

e. Brief description of the causes of and circumstances surrounding the violation with an indication whether the violation was willful, due to careless disregard of instructions, due to emergency circumstances, or due to error.

f. A statement regarding the adequacy of the system of administrative control prescribed pursuant to this directive. If changes in the regulations are needed, in the opinion of the official signing the report, proposals thereof shall be submitted.

g. Two copies of the report shall be forwarded to the Superintendent's office, and a copy shall be furnished the department head(s) involved.

(9) Reprogramming and Redirecting

Allotments shall be reviewed at least four times each year by the Budget Department and concerned Department heads and such reapportionments made, modified, or released as may be necessary to further the effective use of the appropriation concerned, in accordance with the purposes stated in the allotment. Budget Memorandum 69-6 sets forth the conditions and procedures for Reprogramming and Redirecting of funds.

(10) Reserves

A reserve shall be established at each associate superintendent level, and the Superintendent's level to afford flexibilities.

(11) Effective Date

This directive shall become effective on date of issuance.

Board Meeting
June 18, 1969

4.60 School Funds - For purposes of these regulations, school funds are those available to specific schools or other parts of the system but which were not received through allocation from within the system. Most such funds are those generated by school activities or athletic programs. Such resources may also be referred to as local funds.

4.61 General Controls - Standard acceptable bookkeeping procedures are to be followed in recording and accounting for all funds. Specifically:

(1) All funds received by any school activity or organization are to be deposited in the school or commercial bank to the credit of the respective activity or organization. All deposits should show the source of the funds received. The number of titles of school accounts shall be determined by the principal or a committee appointed by the principal for this purpose.

(2) All disbursements out of activity or organization funds shall be made by means of a withdrawl voucher signed by the authorized person and supported by proper bills, invoices, receipts, or other appropriate authorization. These supporting papers should be retained for the inspection of auditors or other authorized persons. However, no bills shall be paid nor expenditures made from undeposited funds.

(3) A cash book is to be maintained containing the records for each activity or organization concerned showing each transaction with a brief explanation of the nature of the transaction, including the source of funds received or disbursed, expense or equipment items paid for, or transfers of funds in or out.

4.62 Special Controls for Athletic Program Funds All tickets used in the athletic program are to be secured and accounted for through the office of the supervising director of athletics. This includes all athletic contests, both league and non-league.

(1) Tickets must be obtained from the office of the supervising director of athletics by a responsible person from each of the senior high schools and vocational high schools. This person will be required to sign a receipt for all tickets received. A copy of this receipt will be retained by the school as well as the supervising director of athletics.

(2) At the end of each sport season, an accountability of tickets, sold and unsold, is to be recorded on this receipt and returned with all unsold tickets to the office of the supervising director of athletics. This receipt will be signed by the person receiving the report and tickets and returned to the school for its record. Schools are responsible, moneywise, for all tickets which are not returned to the office of the supervising director of athletics.

(3) Each principal shall appoint a responsible person within the school to handle tickets, to be responsible for them and make the ticket reports. There must be one central station in each school at which the students may purchase tickets. All tickets must be sold in order of sequence. Unsold tickets returned to the supervising director of athletics in order of sequence can be reissued to the schools.

(4) To insure proper accounting of both income and tickets, the following procedures must be followed:

  (a) Tickets must be used for all athletic events whenever admission is charged. Money shall not be received at gate without using tickets.

  (b) Tickets are not transferrable to be passed on to other schools to be sold. Schools concerned should furnish their own tickets.

  (c) Permission for gratis admission for athletes must be obtained, well in advance of game time, from the supervising director of athletics, the coach concerned must accompany the athletes to identify them at the gate, and each athlete must show an identification card (credential card) to the ticket taker.

4.63 Uses of School Funds - There are many acceptable uses of funds. Among them are:

(1) Supplementary supplies and materials for the improvement of instruction: reading accelerators, radios, tape recorders, public address system, intercommunication system, playground equipment, musical instruments.

(2) School activities not self-sustaining: school publications, dramatics, exhibits, orchestra and bands, banquets, dances, teas, etc.

(3) Student aid: food, clothing for indigent pupils.

(4) Athletics: uniforms and equipment for students in elementary and junior high schools, participation in athletic events, insurance.

(5) Recreation: ping-pong equipment, games - checkers, supplies, such as tennis balls, volley balls, etc.

(6) Improvement and beautification of school grounds and buildings: shrubbery, grass and gardens, first-aid rooms.

(7) Cadet activities: participation in military cermonies and events, presentation of cadet commissions, annual competitive drill.

(8) Charitable and philanthropic activities: Jr. Red Cross, one fund drive (teachers only).

(9) Transportation: educational trips, athletic teams, cadets.

4.64 Reporting of School Funds - Although school funds are not controlled by the central administrative offices of the system, certain reporting requirements must be met.

(1) Basis of Report - The cash book, containing the records of school funds, must be summarized semi-annually, and the report of school funds, other than appropriations must be prepared.

An internal auditing committee of at least three persons, appointed by the principal, shall audit the records semi-annually. Upon completion of the audit, the auditing committee will sign the report of school funds, other than appropriations (Form 79A), and submit it to the principal along with Form 492. Form 492 provides special columns for essential information - beginning balance, receipts, transfers, payments for expenses and equipment, and ending balance - of the various accounts to substantiate the amounts listed on Form 79A.

(2) Procedures for Report Preparation - The report of school funds, other than appropriations (Forms 79A and 492), shall be made to the Accounting Section on or before the end of each semester. This report shall include the following items:

(a) Beginning Balance - This represents the balance brought forward from the report made from the previous semester.

(b) Receipts - This includes all monies received from sources other than transfers, loans, and advances from other school funds.

(c) Total Receipts to be Accounted for - The sum of items a and b.

(d) Disbursements - This includes all payments for current operation of the activity represented by the fund, exclusive of payments for equipment. Separately within disbursements, all payments for items of material or equipment, the life of which is one year or longer, must be reported.

(e) Total Disbursements - The sum of operating and equipment disbursements.

(f) Balance - This figure represents the beginning balance plus receipts minus disbursements for expenses and equipment. This is the balance shown on the financial report at the close of the previous semester. This figure becomes the beginning balance of the report for the next semester.

(3) Special Reporting for Athletic Events - The income from the sale of tickets as shown on the financial reports (athletic semester reports to the supervising director of athletics) must agree with the income represented by the sale of tickets as reported on the ticket record reports. Any discrepancies in the two reports must be explained in writing to the supervising director of athletics.

Each senior high and each vocational high school will also prepare and transmit to the supervising director of athletics a "Report on Receipts and Expenditures for Interscholastic Athletics" each semester. The balance of this report for the second semester should reconcile with the ending balance of the athletic fund on Form 492. Procedures for the preparation of this report should be in accordance with instructions issued by the supervising director of athletics.

(4) Within School Reporting - The reporting requirements above are intended to meet the needs of the central administrative offices. In general, more detailed reporting should be provided for within-school purposes.

4.70 Non-Resident Tuition - The Accounting Section shares the responsibility for the enforcement of Public Law 86-725 (District of Columbia Non-Resident Tuition Act) with schools, departments and offices of the school system. The Accounting Section's primary responsibilities are (1) computation of annual tuition rates, (2) billing outside agencies for tuition owed, (3) reconciliation between the D. C. Treasurer and the school system of funds collected, (4) reporting to school and D. C. officials the accounts receivable, and (5) refunding tuition paid in cases where the final appeal official has ruled that tuition is not due.

4.71 Computation of Annual Tuition Rates - The Accounting Section is responsible for computing the annual tuition cost for all levels of schools, courses, and classes. These rates for the ensuing year are based upon the actual cost incurred during the current operating school year for those costs which are directly related to instructional services. Rates computed by the Accounting Section are thoroughly audited by the D. C. Internal Audit Office to insure compliance with established procedures and accuracy of computations. After the rates have been audited, they are officially approved by the Board of Education and the D. C. City Council. The Accounting Section is also responsible for the computation of a "Table of Tuition" for days of

Due in June

Form 79a
Rev. 1966

PUBLIC SCHOOLS OF THE DISTRICT OF COLUMBIA
REPORT OF SCHOOL FUNDS, OTHER THAN APPROPRIATIONS

.... School   For School Year ....

Account ....   Depository ....

1. Balance, June 1, 196.. $..................

2. Receipts ....

3. Total receipts to be accounted for .... $..................

4. Disbursements:

   (a) Expenses .... $..................

   (b) Equipment ....

5. Total Disbursements ....

6. Balance, May 31, 196.. $..................

I hereby certify that the foregoing statement of the receipts, disbursements, and balances of the above entitled account is correct and that said fund is deposited in the depository named above.

....

We hereby certify that we have audited the accounts of the foregoing fund and find the same to be correct and as stated, and the balance as shown on hand May 31, 196......., to be on deposit with the depository.

Approved:

....
Signature of official in charge of school

....
Official Designation

....

....

....
Audit Committee

P-4510

Date ...., 196.......

Figure 3-47

Form No. 492

F-4[illegible]

NAME OF SCHOOL

Report of School Funds, Other Than Appropriations, for the Year Ended, Date

	BEGINNING		TRANSFERS		PAYMENTS		ENDING
ACCOUNT	BALANCE	RECEIPTS	In	Out	EXPENSES	EQUIPMENT	BALANCE
TOTALS							

Allotment Code

Allotment Codes FY 9010 and 9011:

First Position	Program Category
0--	Elementary Education
1--	Secondary Education
2--	Vocational Education
3--	Summer School and Continuing Education
4--	Model Schools
5--	Special Education
6--	Instructional Services
7--	Educational Support Services
8--	Administrative Services
9--	General Administration

Second & Third Positions	Source of Fund
-01	District Appropriation
-02	District Appropriation, Matched Funds
-11	Impact Aid
-12	Impact Aid, Matched Funds
-21	ESEA, Title I
-22	ESEA, Title II
-23	ESEA, Title III
-24	ESEA, Title IV
-25	ESEA, Title V
-26	ESEA, Title VI
-31	ESEA, P. L. 89-750, Neglected & Delinquent Children (T. 1)
-32	ESEA, P. L. 89-750, Adult Basic Education (T. 3)
-33	ESEA, P. L. 89-313, Aid to Children in Schools for Handicapped (T1)
-34	ESEA, P. L. 89-750, Adult Demonstration Center (T.3)
-41	Higher Education Act, Expansion of Teaching of the Mentally Retarded P. L. 85-926
-42	Higher Education Act, National Teacher Corps
-43	Higher Education Act, E. D. P. A.
-61	Civil Defense
-62	Civil Rights Act
-63	National Foundation of Arts and Humanities
-64	Manpower Development
-71	OEO, Head Start

Accounting Codes by Program Category and Program -

A. Elementary Education, Program Category 0--

Activity No.		Office or Program
01-		Departmental Office
	01A	Departmental Office
02-		Schools
	02S	Schools
03-		Other Programs
	03C	Classroom Assistance Program
	03D	Project Read
	03E	Prekindergarten Program
	03F	Teacher Corps
	03G	Language Arts Program
	03J	Tri-School
	03K	Radio-TV Project

B. Secondary Education, Program Category

Activity No.		Office or Programs
11-		Departmental Office
	11A	Departmental Office
12-		Schools
	12S	Schools
13-		Other Programs
	13A	Teacher Corps
	13B	Project Read
	13C	Teacher Aide and Assistance Program
	13D	Reading Incentive Seminar
	13E	Mathematics Laboratory
	13F	Cultural Enrichment
	13G	STAY School
	13H	Humanities and Arts
	13K	Strengthening Instructional Services
14-		Driver Education Program
	14A	Driver Education Program
15-		Extended Day Program
	15A	Extended Day Program

C. Vocational Education, Program Category

Activity Number		Office or Program
21-		Departmental Office
	21A	Departmental Office
22-		Schools
	22S	Schools
23-		Manpower Development
	23A	State Supervision
	23B	Other Projects
	23C	Work Incentive Program
24-		Vocational Education Programs
	24A	Secondary
	24B	Post Secondary
	24C	Adult
	24D	Handicapped (Socially)
	24E	Handicapped (Physically)
	24F	Construction
	24G	Guidance
	24H	Contractual Training
	24J	Research and Training
	24K	Exemplary Program
	24L	Consumer and Homemaking Education
	24M	Cooperative Vocational Program
	24N	Ancillary Service

D. Summer School and Continuing Education, Program Category

Activity No.		Office or Program
31-		Departmental Office
	31A	Departmental Office
33-		Evening Programs
	33A	Evening School Program
34-		Other Programs
	34A	Adult Demonstration Center
	34B	Civil Defense Program
	34D	Adult Basic Education Program
	34E	Americanization School
	34F	Community Schools Project
36-		Summer Programs
	36S	Summer Schools, Regular
	360	Head Start
	361	Basic Community School Program
	363	STAY
	365	Urban Journalism
	366	Urban Studies
	368	Summer Scholarship, Trinity College
	369	Summer Scholarship, Potomac School (Matching funds)
37-	370	Summer Scholarship, Uncommitted
	371	Smithsonian Summer Art Workshop
	372	Home Economics Workshop
	374	New School Orientation
	375	Workshop Careers in the Arts
	376	Primary Summer School
	377	Summer Camp-Out
	378	Model School Division
	379	Pupil Personnel Services
38-	380	Vocational Orientation for 7, 8, 9, 10
	381	Widening Horizons (Urban Service Corps)
	382	Smithsonian Summer Program
	383	D. C. Youth Chorale Music Program
	384	Reading Improvement - 13.7
	385	Youth Serving Youth (pupil personnel)

Activity No.		Office or Program
		Summer Programs
	386	D. C. Youth Symphony Orchestra
	387	Evaluation
	388	Armstrong Adult Education
	389	Americanization
39-	390	Language Arts
	391	Driver Education
	392	Occupational Training Children for the Handicapped
	393	Goddard Space Center 2 Beltsville Labs.
	394	Administration of Fieldtrips
	395	Work Scholarship
	396	Neighborhood Youth Corps
	397	Child and Youth Study
	398	Youth Opportunity
	399	FLNT
	39A	Interneighborhood Creative Activities

E. Model, Community, and Anacostia Schools, Program Category

Activity No.		Office or Program
45-		Community Schools
	45S	Community
	45S1*	Adams
	45S2*	Morgan
	45S3*	Fort Lincoln
46-		Anacostia Schools
	46S	Schools
	46B	Anacostia - Extended Day

*It is recommended that a more detailed accounting system be provided in order to distinguish among financial transactions of the different community schools. The suggestions above only serve as examples.

F. Special Education, Program Category

Activity No.		Office or Program
51-		Departmental Office
	51A	Departmental Office
52-		Schools
	52A	Sharpe Health School
	52B	Boy's Junior - Senior High School
	52C	Webster Girls' School
53-		Tuition Programs
	53A	Tuition Programs
54-		Other Programs
	54B	Education of Neglected and Delinquent Children
	54C	Program For Emotionally Disturbed
	54D	Severely Mentally Retarded
	54E	Rubella Children
	54F	Twilight
	54G	Handicapped Children, Military Road
	54H	Handicapped Children, Lennox Annex
	54J	Handicapped Children, Richardson Annex

G. Instructional Services, Program Category 6--

Activity No.		Office or Program
61-		Divisional Office
	61A	Divisional Office
62-		Pupil Personnel
	62A	Regular
63-		Staff Development
	63A	Educational Resources Center
	63B	Pilot Project for Trainers of Teachers
	63C	Attracting and Qualifying Teachers
	63D	Resource Center on Negro Heritage
	63E	In-Service Education on Personal and Family Counseling
	63F	WISE
	63G	Institute for Educational Development
	63H	Staff Development-Elementary
	63J	Strengthening Instructional Services
	63K	In-Service Training Program
	63L	Model Elementary and Secondary Staff Development
	63M	Developmental Center-Special Education
	63N	Fellowships for Teachers of Teachers of Handicapped
	63P	Other Staff Development
	63Q	Urban Teacher Corp
	63R	Departmental Office
	63T	Teachers of Afro-American Experience
64-		Other Instructional Service Departments
	64A	Curriculum Department
	64B	English Department
	64C	History Department
	64D	Mathematics Department
	64E	Home Economics Department
	64F	Business Education
	64G	Reading Clinic
	64H	Music Department
	64J	Art Department
	64K	Health, Physical Education and Safety
	64L	Speech and Hearing Center
	64M	Foreign Language Department
	64N	Industrial Arts Department
	64P	Science Department
	64Q	Military Science and Tactics
	64R	Library Science

Activity No.	Office or Program
65-	FLNT Instructional Services
65A	Curriculum Department
65B	English
65C	History
65D	Mathematics
65E	Home Economics
65F	Business Education
65H	Music
65J	Art
65K	Health, Physical Education
65L	Speech and Hearing Center
65M	Foreign Language
65N	Industrial Arts
65P	Science
65R	Library Science

II. Educational Support Services, Program Category

Activity No.		Office or Program
71-		Division of Planning, Innovation & Research
	71A	Divisional Office
	71B	Department of Program Planning & Innovation
	71C	Department of Research and Evaluation
	71D	Department of Planning and Innovation
	71E	Title III Administration
	71F	Educational Parks
	71G	George Washington University Evaluation
72-		Personnel Services
	72A	Personnel Support
	72B	Employer-Employee Relations
	72C	Substitute Calling Service
73-		Teacher Retirement
	73A	Teacher Retirement
74-		Other Programs
	74A	School Desegregation Program
	74B	Urban Service Corps
	74C	Educational Media Center (FLNT IMC)
	74D	Work-Scholarship
	74F	Neighborhood Youth Corp

I. Administrative Services, Program Category

Activity No.		Office or Program
81-		Divisional Office
	81A	Divisional Office, Administrative Services
82-		Buildings and Grounds
	82A	Departmental Office
83-		Building Maintenance and Repairs
	83S	Schools
	83B	Others
84-		Building Operations
	84S	Schools
	84B	Departments
	84C	Others
85-		Business Administration Department
	85A	Departmental Office
	85B	Supply Management
	85C	Services, Administration
	85D	Accounting
	85E	Food Services, Administration
	85F	Transportation of Students
	85G	Distribution Facilities
	85H	Equipment Maintenance and Repairs
	85J	Lunch Program
	85K	Breakfast and Milk Program
86-		Automated Information Services
	86A	Automated Information Services
87-		Warehouse
	87A	Warehouse Supply

J. General Administration, Program Category

Activity No.		Office or Program
91-		Board of Education
	91A	Board of Education
92-		Office of Superintendent
	92A	Office of Superintendent
93-		Office of Vice Superintendent
	93A	Office of Vice Superintendent
94-		Special Projects
	94A	Special Projects
95-		Budget and Legislation
	95A	Budget and Legislation
96-		Public Information Office
	96A	Public Information Office
97-		Office of Executive Assistant
	97A	Office of Executive Assistant
98-		Community Participation - FLNT
	98A	Community Participation

(2) Personnel benefits reflect those employees in which the school system participates. Most significant are retirement contributions (FICA), Teachers Retirement, Civil Service), and insurance.

(3) Travel and Transportation of Persons (21 series), and Transportation of Things (22 series) are those codes designating contract travel costs, including local travel as well as drayage or moving costs.

(4) Rent, Communications and Utilities form a group of codes (23 series), representing electric, rental, telephone, and related costs, including postage.

(5) Printing and Reproduction coding includes all contract printing or reproduction services. Forms, diplomas, letterhead, envelopes, and other such items are appropriately coded to this group.

(6) Other Contractual Services (grouping 25), includes all special, professional, or technical services obtained by the school system but not provided by employees of the system. Most significant are 25-54 special and miscellaneous services, 25-31 fees for professional services (consultants, etc.), and payments to various institutions (25-55 and 25-56), for special education services.

(7) Supplies and Materials (26 series), comprise the majority of purchases made by the school system. Most important are 26-23 Educational Supplies and Materials, 26-31 Heating Fuel, 26-11 Custodial Supplies and Tools, and 26-88 Office Supplies.

(8) Equipment for capitalization and replacement pruposes (series 31 and 32), include all purchases of items whose life expectancy exceeds one year. In addition, it includes 32-57 Textbooks and 32-68 Library Books.

4.16 Object Coding - The last four digits of the appropriation symbol reflect the major and minor objects of expenditure coding required for every pay document, whether a payroll action, purchase of a commodity, or contract for services. The major object code groupings are: 11- personnel compensation; 12- personnel benefits; 21- travel and transportation of persons; 22- transportation of things; 23- rent, communications and utilities; 24- printing and reproduction; 25- other contractual services; 26- supplies and materials; 31- equipment to be capitalized; 32- equipment not to be capitalized; 41- grants and fixed charges. These groupings are intended to reflect the general categories of things or items for which funds are authorized and intended to be used. A brief description of each follows:

(1) Personnel Compensation reflects all payments of salaries and wages. The coding within the major object grouping designates the type of compensation involved. The most significant codes in this group are:

(a) 11-11 Classified Permanent, which is designated as the proper code for all full-time General Schedule employees, regardless of their program assignment. All other General Schedule employees will be coded 11-21 as regular part-time, or 11-22 on temporary or intermittent assignment.

(b) 11-14 Teachers Salary Act 12 Months Appointment, which includes all personnel in a work status for 12 months. It will also include all employees considered officers who have evening, summer or other less-than-full time assignments as officers.

(c) 11-15 Teachers Salary Act 10 Months Appointment, including all TSA Class 15 employees as well as any other TSA employee in a 10 month work status. This code will also include all evening and summer TSA employees not considered officers.

(d) 11-16 Wage Board Rates, including all full-time employees whose compensation is not established by provisions of the Teachers Salary Act or the General Schedules.

(e) 11-61 TSA, Extra Duty Pay and WAE Teachers are included. In general, the WAE personnel will be reflected only when a program requires both full-time and part-time TSA personnel.

(f) 11-62 Substitute Teachers, including those employees who assume the responsibilities of teachers in the absence of the teachers.

D. C. Schools
Object Codes
FY 1970

- 10 PERSONAL SERVICES AND BENEFITS
  - 11 Personnel Compensation
    - 11 Classified, Permanent
    - 14 Teachers' Salary Act Employees
    - 16 Wage-Board
    - 21 Part-Time, Permanent (Classified)
    - 22 Temporary (Classified)
    - 41 Night Work Differential
    - 42 Holiday Pay
    - 43 Overtime (Including extra duty pay)
    - 45 Sunday Premium Pay
    - 50 Terminal Leave
    - 61 Temporary, WAE Teachers
    - 62 Substitute Teachers
    - 94 Wage Board, Part-Time
  - 12 Personnel Benefits
    - 11 Insurance (Group Life)
    - 12 Health Benefits
    - 13 Civil Service Retirement Contribution
    - 14 D. C. Contribution to Teachers' Retirement and Annuity Fund
    - 15 Retirement Contribution FICA
    - 19 Notary Public

- 20 CONTRACTUAL SERVICES
  - 21 Travel and Transportation (Persons)
    - 12 Automobile Allowances
    - 13 Travel Expense (Not Subject to Limitation)
    - 14 Travel Expense (Subject to Limitation)
    - 19 Travel, Miscellaneous
  - 22 Transportation of Things
    - 19 Transportation of Things, Miscellaneous
  - 23 Rent, Communications, and Utilities
    - 11 Rent of Land, Buildings, and Structures
    - 14 Rent of Office Machines
    - 19 Rent, Miscellaneous
    - 21 Postage
    - 29 Communication Services, Miscellaneous
    - 39 Utility Services, Miscellaneous
  - 24 Printing and Reproduction
    - 51 Printing and Reproduction, Miscellaneous

- 25 Other Services
  - 19 Insurance, Miscellaneous
  - 31 Fees, Professional Services (Consultants, Training Programs, etc.)
  - 32 Fees, Real Estate Appraisers
  - 39 Fees, Miscellaneous
  - 54 Special and Miscellaneous Services
  - 55 Education of Persons in Federal Institutions
  - 56 Education of Persons in Private Institutions
  - 69 Maintenance and Repair, Miscellaneous
  - 71 Dues (Subject to Limitation)
  - 72 Dues (Not Subject to Limitation)
  - 93 Maintenance and Repair of Motor Vehicles (SPBOA)
  - 94 Repairs and Alterations of District Property (SPBOA)
  - 99 Services Performed by Other District Agencies
- 26 Supplies and Materials
  - 02 Direct Purchases
  - 11 Custodial Supplies and Tools
  - 22 Subscriptions to Newspapers and Periodicals
  - 23 Educational Supplies and Materials
  - 31 Heating, Fuel
  - 39 Fuel, Miscellaneous
  - 41 Uniforms
  - 54 Milk and Milk Projects
  - 59 Provisions, Miscellaneous
  - 88 Office Supplies
  - 99 Miscellaneous Supplies and Materials
- 31 Equipment (To Be Capitalized)
  - 23 Culinary Equipment and Containers
  - 29 Equipment, Miscellaneous
  - 71 Office and Classroom Equipment
- 32 Equipment (Not to be Capitalized)
  - 57 Educational (Textbooks and Paperbacks)
  - 68 Library Books
  - 69 Equipment (Not to be Capitalized)
  - 71 Office and Classroom Equipment
  - 74 Cafeteria Furniture and Equipment
- 41 Grants and Fixed Charges
  - 10 Aid to Children of United States Veterans

3.11 Budget

3.11.1 Introduction

Budgeting is principally a planning process which requires the identification and appropriation of the dollars needed in a specific time period to implement one phase of a long-range plan. It is a process which specifies the funds required to provide the resources necessary to implement specific programs aimed toward particular objectives.

Budgeting procedures for the Fort Lincoln Schools can be designed so that they are flexible and meet the information requirements and timing needs of the D. C. Schools, the General Services Administration of the D. C. Government, and the Congressional budget cycle. The design of internal timing cycles and of the forms and records to be used will be the responsibility of the Administrative Coordinator, and should reflect planning conducted in Phase I of the training program.

3.11.2 Assumptions

A basic assumption underlying the budget subsystem is that funds for the Fort Lincoln Schools will be authorized by the D. C School administration and the D. C. School Board. Plans call for operating the Fort Lincoln Schools at the same level of per capita funding as for operating the schools in the D. C. system, i.e., $965 projected for 1970-71. The allocation of these funds to different programs within the Fort Lincoln Schools may vary, depending upon the goals and objectives established for the system.

Budgeting procedures for the Fort Lincoln Schools have been designed to be independent of D. C. Schools' procedures wherever possible. The procedures will allow Fort Lincoln personnel to rely primarily on their own resources to run the schools, using only minimal assistance from the D. C. Schools. For example, wherever forms production would substantially increase the D. C. Schools' cost of printing, Fort Lincoln operations will assume the cost or reimburse the D. C. central office. Or, the purchasing procedures for the Fort Lincoln Schools could be structured in such a way as not to add significantly to the D. C. Schools' costs of administering Fort Lincoln purchasing operations.

3.11.3 Budget Cycle

The current operating procedures of the D. C. Schools require that building staff provide budget inputs approximately 14 months prior to the operating year in which the funds will be used. In addition, the staff must provide inputs to the Budget Office of the D. C. Schools in the spring of a given year for the fiscal year two years following the one in which they are currently working. The cycle may be depicted as follows:

Spring 1970

School staff submits
budget requests to
D. C. Schools office.

FY '71

Fall 1970

Requests reviewed
in D. C. Schools
office and submitted
to city government
and Congress for
action around Jan. 1.

Spring 1971

Budget acted upon
by Congress.

FY '72

Fall 1971

Spring 1972

Operational year for budget submitted
in Spring 1970.

Since the FY '72 budget will have been submitted before the Fort Lincoln Schools begin to operate, staff will not have the opportunity to provide budget inputs unt FY '73. Since these requests must be submitted initially in early Spring 1971, the extent to which modification to the first year's budget is limited will be based upon operating experience. Thus the staff must begin the budget development process immediately after school begins.

3.11.4 General Elements of Program-Planning-Budgeting System

The discrete elements of PPB are not new processes advocated in educational systems or large organizations. Instead, the argument for using PPB is that the process fosters examination of the entire set of operations of an organization and results in a systematic approach to planning and allocating resources. PPB then is a unifying force in the management process.

Conventional budgeting permits the school administrator to ask how much was appropriated or spent for a particular resource, e.g., "How many teachers were hired at TS15?" PPB encourages information to be organized in such a way that he may ask "What did it cost to improve the learning skill of preschoolers in FY 1973?" The answer to such a question requires information about the total costs associated with a particular program effort. When all the implications of such a question are identified, it becomes evident that several discrete elements are critical to a worthwhile PPB process:

- Identification of budget programs
- Identification of goals and objectives
- Identification of alternatives for reaching those goals

6

- Identification of program priorities
- Identification of financial resources required for each alternative
- Evaluation of program efforts.

The result of the foregoing is a clearly developed set of plans for realizing systems objectives, giving the administrator and teacher a rational operating base and assisting the community to understand the policies of the school system.

Budget Programs

The most serious problems in school budgeting today are the difficulties of relating program efforts to costs and the failure to use the budget process as a planning tool. One of the first steps in attempting to correct these ills is to identify program costs.

Program costing should relate the financial resources required to the specific outcomes that the organization is trying to realize. Conventionally, the school budget simply displays the objects required to support the system's operations within such broad functions as Instruction, Operations and Maintenance, and Administration. These broad categories bear very little relationship to program outcomes. The challenge is to develop a budget based on a program structure for the Fort Lincoln First Facility within which both procedures and format can be refined as the school operates.

The Fort Lincoln educational program is not the traditional one of reading, mathematics, physical education, etc. Instead, the individualized program is an organic whole within which efforts are directed toward developing the learning skills, emotional well-being, and physical health of children at different learning stages. Therefore, analysis of budget efforts in terms of conventional curriculum areas serves little useful purpose. It is not the purpose of the school to develop specific predictable capabilities in each of several subject areas. Knowing the costs associated with specific curriculum areas is not useful to decision making and planning, since ideally there will be a different program structure for each child. Since stage efforts are aimed at a total organic approach, it then becomes meaningful to look at program efforts in terms of total stage efforts. Indicators of redirection will come in analyzing the extent to which the needs of groups of children are being served. In this way, planning and decision making can be related to the programmatic efforts of the school -- the total stage effort. In addition, programmatic efforts will be made in the areas of staff development and community participation. Support Services will be the function of General Administration.

For initial classification, it is useful to distribute Fort Lincoln School costs so that a particular sum will appear for each entry as part of the costs of the total system:

Program	Costs
General Administration	$ 127,490
Staff Development	32,490
Community Participation	262,270
Instruction	
Stage I	163,850
Stage II	199,260
Stage III	239,820
Total	$1,025,170

These kinds of costs have not appeared in D. C. School budgets up to this time. However, the new account code structure of the D. C. Schools does permit the identification of cost centers very much like those proposed here. For example, there are now identifiable codes for Elementary Education, Secondary Education, and Instructional Services (Math, Science, Music, etc.). Therefore, the Fort Lincoln system will be completely compatible with current operations of the D. C. Schools. A discussion of the items indicated in each of these categories appears in Volume III of the Midterm Report, pp 6-9 and 6-10.

Naturally within each program will be standard line-item account coding, permitting ready consolidation across programs.

Budget estimates for the first year of operation of the Fort Lincoln First Facility are displayed in Figure 3-49. This table displays conventional line items against budget programs. As operations are refined, it may become evident that more detailed or even different budget programs would provide more meaningful information. There is nothing sacred about a given budget program structure for an elementary school. As a matter of fact, initial attempts at installing PPB systems across the country have demonstrated that budget systems should be custom-tailored to meet local needs.

3.11.5 Staff Participation and Responsibilities

One of the current problems in school administration is that budget building processes are central-office dominated. The people who run programs and make decisions daily within these programs often have little opportunity to provide inputs to the planning process.

At the school level, the Administrative Coordinator will be responsible for coordinating the entire budget process, and will submit the building budget to the D. C. Schools. These budgets naturally will reflect the combined efforts of

Object Class	ivity						Total
	General Administration	Stage 1	Stage 2	Stages 3-4	Staff Development	Community	
Personnel							
Level 1	0	0	0	0	0	0	0
Level 2	0	0	0	0	0	0	0
Level 3	50.80	25.40	38.10	50.80	12.70	16.06	193.86
Level 4	0	17.60	26.40	35.20	0	17.90	97.10
Level 5	11.72	23.44	23.44	23.44	0	82.86	164.90
Stipends (students)	0	4.05	2.70	2.70	a	18.00	27.45 (1)
Office Equipment							
Capitalized	.60	.04	.04	.04	0	7.50	8.22
Not Capitalized	3.00	.05	.05	.05	0	1.50	4.65
Classroom Equipment							
Capitalized	0	4.63	5.25	5.23	0	0	15.11
Not Capitalized	0	1.25	1.00	1.00	0	0	3.25
Office Supplies and Materials	.80	.30	.30	.30	0	3.00	4.70
Classroom Supplies and Materials	0	35.03	41.47	47.91	0	3.25	127.66
Communication and Printing							
Communications	1.50	.75	.75	.75	0	.75	4.50
Printing	1.75	.75	.75	.75	0	5.00	9.00
Travel							
In-Town, Professional	.18	.04	.06	.09	0	2.59	2.96
Out-of-Town, Professional	1.48	.59	.89	1.33	0	10.36	14.65
In-Town, Students	0	.31	.35	1.16	0	0	1.82
Consultants and Contracts							
Consultants	0	2.31	2.31	2.31	0	13.50	20.43
Contracts	40.00	8.50	5.50	6.00	7.0	50.00	117.00
Operation and Maintenance							
Personnel	7.83	8.47	10.27	12.33	2.00	15.00	55.90
Supplies and Materials	7.83	8.47	10.27	12.33	2.00	15.00	55.90
Lunch Program	0	21.88	29.38	36.25	0	0	87.51
Total	127.49	163.85	199.26	239.82	32.49	262.27	1,025.17

Figure 3-49 Annual Operating Costs

(1) Substitutes - 8.80

staff and community serving together on the local budget committee. The Administrative Coordinator will work with the stage leaders, coordinators, and community in assisting them to develop the instructional elements of the budget. The non-instructional elements will be developed by the Office Manager and reviewed with the Administrative Coordinator.

The budget process illustrated in Figure 3-50 which will be submitted to the D. C. Schools will be comprised of several components, each of which is the responsibility of a particular staff member. It is important to note however that each of the individual budget documents reflects the efforts of the school budget committee, which provides the community inputs.

The individuals identified in the flow chart will assume overall responsibility for the budgets of their individual components, and will in turn be responsible to the Administrative Coordinator for their implementation. They must involve all members of the component in program planning, where possible. Technical assistance in identifying resources and costing will be provided by the Office Manager and team leader. For example, the stage budget will be developed by all staff members within each stage, and will be the overall responsibility of the stage representative. He will develop procedures to assure participation by stage members in the budget process. Students (Stages II and above) must also be involved so that they, too, may help identify resources needed in the future. The involvement of students in the budget making process need not be formal and extensive; for example, it might be best simply to poll the entire group within the stage regarding items they would like to have available to them. It is expected that this involvement would increase in quantity and sophistication as students get older and move through stages.

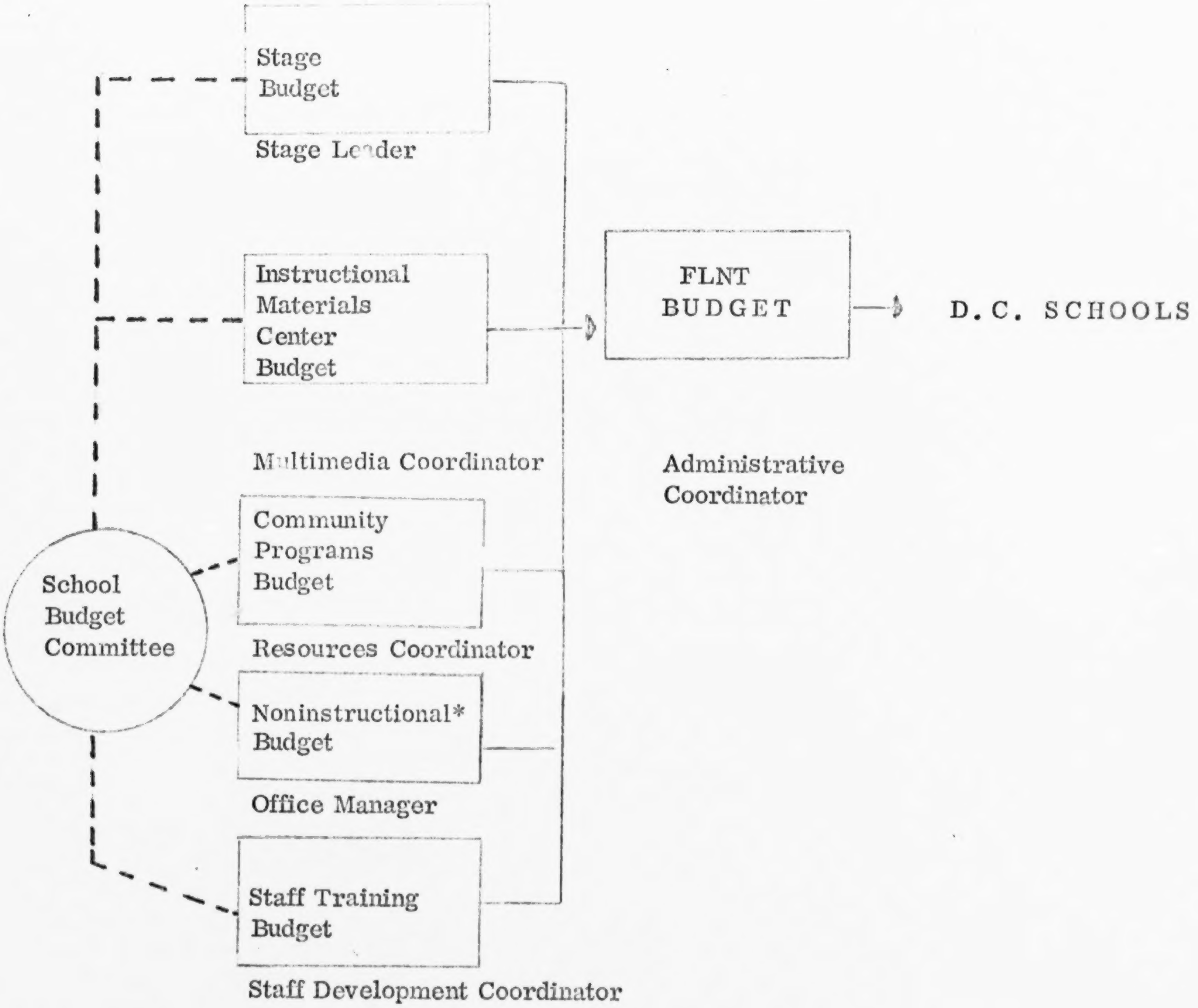

Stage Budget
Stage Leader
Instructional Materials Center Budget
Multimedia Coordinator
FLNT BUDGET
D.C. SCHOOLS
Administrative Coordinator
School Budget Committee
Community Programs Budget
Resources Coordinator
Noninstructional* Budget
Office Manager
Staff Training Budget
Staff Development Coordinator

Figure 3-50

*Will include costs for: General Administration, Consultants and Contracts, Building Operations and Maintenance, Food Services, and Transportation.

3.11.6 Community Participation

The community will be primarily concerned with two areas of the budget process. The first is the overall budget for the Fort Lincoln Schools in which the Budget Advisory Committee will be involved. The second is the specific budget for community participation activities which will be the responsibility of the community task force, assisted by the Resource Coordinator and selected school staff.

As referred to in the Operating Plan, the Budget Advisory Committee will be comprised of four community members appointed by the Ward Representative on the Board of Education, two staff members elected by the school staff, and one Fort Lincoln School administrator.

This procedure has precedence in the D. C. Schools, since it is the current vehicle for involvement of the community in the budgeting process of the local school, and guidelines are available in the Budget Office. The opportunity should be seized upon by the community to enable them to be truly involved in program evaluation and planning, rather than functioning simply as a review board. In addition, this would allow the community to become intimately involved in program evaluation and in the development of priorities.

While the Budget Committee will work with each of the individuals responsible for the budgets of the various components, the Resources Coordinator will provide support to each of the staff members in budget preparation.

3.11.7 Budget Process

The budget process is depicted in Figure 3-51. Cost estimating will be directed by the Administrative Coordinator. He will also be responsible for the accumulation of all fiscal plans for all programs in order to consolidate the total cost requirements of the Fort Lincoln Schools.

The Office Manager will be responsible to the Administrative Coordinator for the accumulation of program cost requirements, the allocation of available funds to programs, the communication of financial plans to the administration and community (as approved by the school and Community Budget Committees), and the acquisition of budget approval through all levels of D. C. administration. The primary inputs for cost allocation will be provided by the Operating Team.

On a broad basis, some of the elements which must be present in an appropriately developed budget process can be identified. The forms which will be used to display this information should be developed after operations begin.

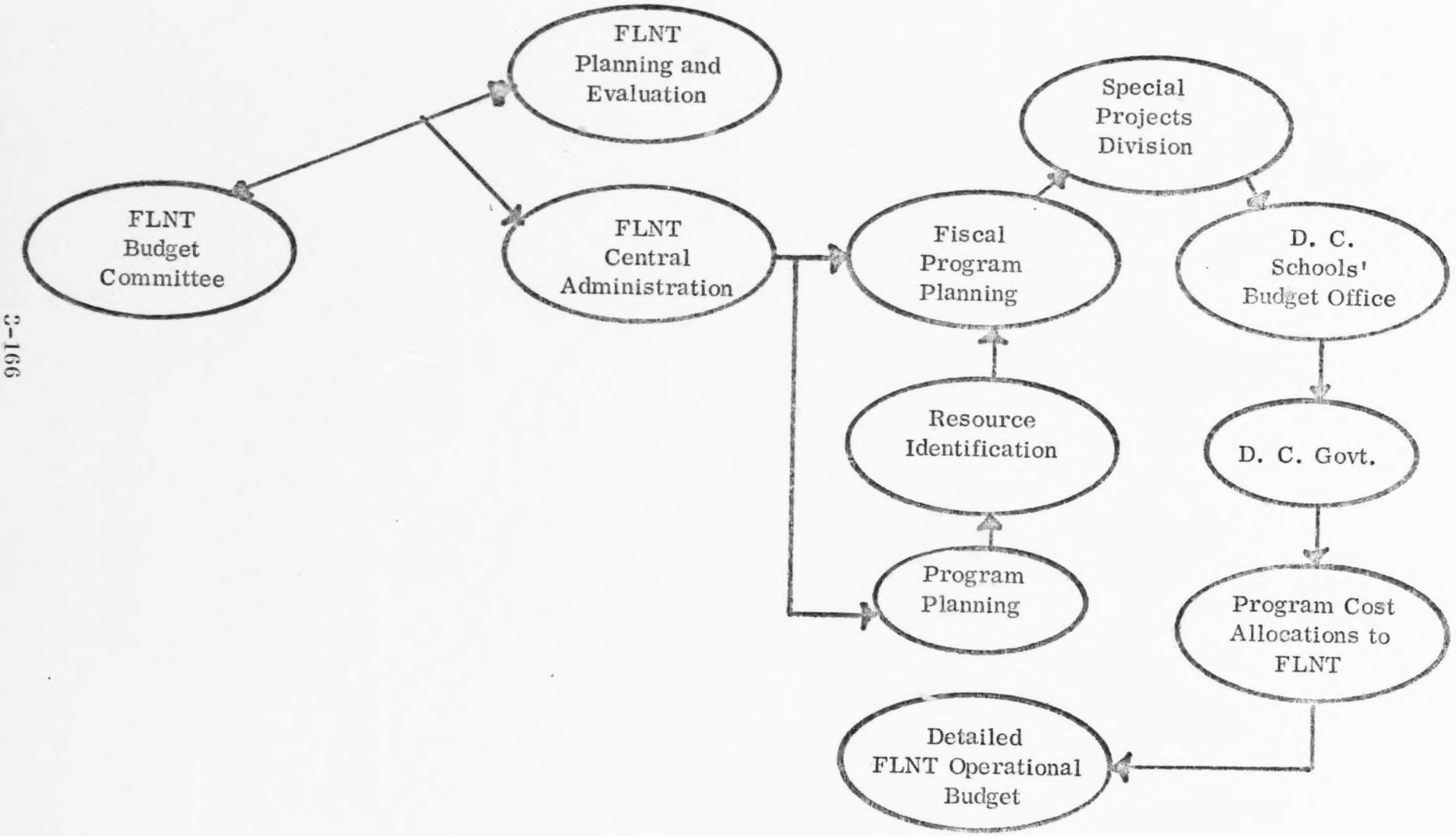

FLNT Planning and Evaluation
FLNT Budget Committee
FLNT Central Administration
Special Projects Division
Fiscal Program Planning
D. C. Schools' Budget Office
Resource Identification
D. C. Govt.
Program Planning
Program Cost Allocations to FLNT
Detailed FLNT Operational Budget

Figure 3-51 Information Flow
FLNT Budget Process

3.11.7.1 Objectives

Ideally, an appropriate program budget shows the ultimate objectives of a program, with a timetable for their achievement. In reasonable planning, this period is usually five years. However, sub-objectives may be shown for each of the years within this period, representing milestones on the way to the long-range objectives. The objectives can be stated best in performance terms, stating what behavior is to be expected of students, parents, teachers, or the system as a result of having realized the objectives.

For example, a specific objective might be to reduce the dropout rate in high school juniors and seniors by 20 percent over a two-year period. Or another objective might be to raise the grade level achievement in comprehension of every remedial reader by 1.2 years on the Iowa Reading Test over the next budget year. In any event, objectives should clearly state the behavior to be achieved, the power associated with that achievement (accuracy over a given period of time), and the timetable for realizing these objectives.

3.11.7.2 Evaluation

Program planning is dependent upon evaluation of current operations -- either an evaluation indicating that present program offerings are inadequate for desired purposes, or that operating programs must be modified to realize their objectives. Thus, after a program is initially specified, the next step in budget planning would be to design the evaluation process.

The design of an evaluation process is specified in the Comprehensive Plan. However, a comprehensive PPB system when fully developed would indicate specific behavioral outcomes to be measured, and the ways in which they will be measured. It is important to note that evaluation procedures must be specified at the time of program planning in order that data can be collected and organized for subsequent evaluation. Community participation in the evaluation process is critical, and is provided for in the functions of the school budget committee and in the evaluation process.

3.11.7.3 Program Alternatives

Program plans may be viewed as the means by which specific program ends (objectives) may be realized. Generally, there are several ways to realize a specific objective or set of objectives, some being better than others, perhaps for reasons of cost, feasibility, etc. A particular selection may have very strong merits in the eyes of the administration, but when seen from the point of view of the community, it may have serious implications. Therefore, all appropriate and affected groups must be involved in proposing alternatives.

It is conceivable that an element of the Fort Lincoln Schools may wish to install a speed reading course. Such a decision may result from inputs received from the community and students. The objective might be to triple the reading speed of all normal readers over the course of one year.

Shown below is an example of how such a program could be installed. Program objectives, plans, and costs are displayed. Instructional resources are also shown. The program is evaluated by assessing the extent to which children increase their reading speed over one year. During program operations, staff members are continually asking if the benefits realized are worth the investment.

Four Year Objectives

At the conclusion of the installation of the Speed Reading Program, which will take four years to complete, the following objectives should have been realized:

For all children: Individual students who select the course will be able to read at a speed triple that with which they entered the program.

For the system: Adequate equipment and curriculum will be installed so that services will be available to all children according to desire and need.

For staff: Selected teachers will be capable of instruction so that services will be available to all children according to desire and need.

The Program Plan (one alternative) might appear as follows:

First Year

• Appoint Speed Reading Coordinator	$12,000
• Design Program	3,000
• Begin in-service training for Stage III staff	2,000
• Start development of formal Reading Materials Center	2,000
• Begin Program, Stage III (January)	-
	$19,000

Second Year

• Continue development of Reading Materials Center	$ 2,000
• Evaluate program efforts and modify Program	2,000
	$ 4,000

Third Year

• Develop Stage III Curriculum Guide for entire program	$ 4,000
• Evaluate program	2,000
	$ 6,000

Fourth Year

• Evaluate, consolidate, and redirect program	$ 3,000
Total program investment costs	$32,000

The plan could be shown in more detail if necessary, and could be supported by appropriate statistics. The reader would then see total program needs in context rather than individual line items scattered throughout a complex budget document. Closer analysis would have to be made to be certain that continuing costs, such as those for staffing a Reading Director, are clearly understood. When the question of curtailing funds arrises, program impact is more readily seen.

3.11.7.4 Program Priorities

It cannot be expected that available funding will be adequate for the total set of programs desired initially. Therefore, some basis must be established for choosing among programs competing for limited funds. One approach is to use priority schedules, described briefly here, for subsequent program expansion.

Priority schedules must be established for all Fort Lincoln School programs and cost elements within programs. Priority ratings would be used as a basis for allocating authorized funds to planned programs. Fort Lincoln administrators and community would be responsible for assigning program priorities, while program committees would assign priorities to the cost elements within programs. Allocation logic based on priority ratings could reduce total program cost requirements to the authorized funded level for a given fiscal period.

Each fiscal period the Fort Lincoln School administration will submit budget requests for all resources administered and allocated by the District of Columbia School administration. To submit a budget request, the Fort Lincoln administration must make decisions concerning the level of funding to request and the program planning details to support the request. Budget decisions must be based on the total cost requirements of the planned programs, the level of funding that can be anticipated for the fiscal period, and a measure of the relative value of all programs to the Fort Lincoln New Town Schools.

The Program Ranking Schedule (Figure 3-52) would establish and quantify the priority and utility of Fort Lincoln School programs and program cost requirements. Schedules are proposed as a method of allocating anticipated or authorized funds to the total cost requirements of the programs. The Program Ranking Schedule establishes the priorities among programs competing for funds. Under priority 1, 100 percent of program 1, 50 percent of program 2, 50 percent of program 3, and 40 percent of programs 5 and 6 will be funded as long as the accumulated required funds do not exceed the total authorized level of funds. If funds are still available after priority 1 requirements are satisfied, priority 2 requirements will be allocated up to the percent limit established in the priority 2 column. The allocating process is continued through all priority levels until the authorized level of funds has been fully allocated. In the example shown, the program rankings have been established such that programs 1, 2, and 3 must be funded 100 percent before funds can be allocated to raise program 5 to 80 percent of its cost requirements.

Assume that each of the five programs listed has the following 100 percent fund requirements:

A - $100,000
B - 120,000
C - 30,000
D - 50,000
E - 200,000
$500,000

Assume also that the total funding available for the given year is only $420,000, less than the total required to fund each program to its stated desired level. When faced with this decision in the past, the administrator would make decisions on cutbacks in light of the funds available, which at times may prove satisfactory. But the method becomes dangerously subjective at the time that the funding level becomes known. Under the system proposed here, the basis for decision making becomes objective regardless of the level of funding.

Applying the priority schedule given in Figure 3-52, the levels of appropriations would be as follows:

Priority	1		2		3		4
Program	%	$	%	$	%	$	
A	100	100K	100	100K	100	100K	
B	50	60K	75	90K	100	120K	
C	50	15K	75	22.5K	100	30K	
D	40	20K	65	32.5K	80	40K	
E	40	80K	65	130K	65	130K	
Total Funding		275K		375K		420K	

This indicates that we would be able to satisfy all but program E at the levels indicated in priority schedule 3. Program E would have to be held back to the level of funding in schedule 2, 65 percent.

3.11.7.5 Resources

The cost of realizing specific programs can best be estimated by first identifying the resources necessary for program operations: personnel, equipment, additional time, etc. The conversion of these resources into costs should be conducted in conjunction with the Administrative Coordinator and Office Manager, who can serve an effective role in projecting economics and cost trends.

FORT LINCOLN NEW TOWN
PROGRAM RANKING SCHEDULES

FUND:
FISCAL PERIOD: 1972

PROGRAM RANKING SCHEDULES

Priority Program	1	2	3	4	5
A	1.00				
B	.50	.75	1.00		
C	.50	.75	1.00		
D	.40	.65	.80	.95	1.00
E	.40	.65	.80	.95	1.00

Figure 3-52

Included in a complete budget proposal would be a display of funding sources anticipated for the particular program over the five year span. Program funding would show the source of monies for the period, e.g., D. C. appropriation, ESEA, private grants, etc. This is particularly useful in long-range planning in order to record when particular sources modify their plans for allocating funds.

3.11.7.6 Reprogramming and Redirection

Occasionally in the operation of the D. C. Schools it is necessary to use budget funds for purposes other than those for which they were originally stated in the budget document, or to determine or substantially reduce a program by redirecting funds to another program. In order to coordinate Fort Lincoln School operations with those of the D. C. Schools in this area, D. C. regulations have been modified for Fort Lincoln operations as shown in the following description.

REPROGRAMMING AND REDIRECTION OF RESOURCES - SERIES 3000
POLICIES REGULATIONS BYLAWS - BUSINESS (3171)
ORIGINAL INSTRUCTIONS OF THE D.C. SCHOOLS - 6/30/69

This directive prescribes the policies and procedures for reprogramming and redirection of appropriated funds for the D.C. Public Schools. Its purposes are to (1) define reprogramming and redirection (2) identify sources of funds for reprogramming and redirection, (3) set forth the authority for reprogramming and redirection, (4) describe the uses and limitations of this device for operational flexibility, (5) give the step-by-step procedure for reprogramming and redirection, and (6) identify approving authorities.

(1) Definition of Terms

For the purpose of this directive the following definitions will apply:

a. Reprogramming is the one time use of funds for a purpose other than the purpose reflected in the budget document and the original financial plan.

b. Redirection is the deliberate decision by a department head and higher authority to terminate or substantially reduce a program by redirecting the funds appropriated for that program to some other program.

(2) Source of funds for reprogramming or redirection

a. Funds used for reprogramming become available through (1) temporary shifts in program impact, emphasis or purpose resulting in the unobligation of appropriated funds, or (2) lapse savings occasioned by the inability to utilize appropriated funds, i.e., vacancies unable to be filled, delays in program starts, or deferrals or reductions in program expenditures caused by either direct or indirect relationships with other programs.

b. Funds used in redirection become available when a decision is made to terminate or permanently substitute one program for another. A major change in agency goals and objectives is involved in redirection.

When funds are approved and appropriated, the D. C. Government, the Congress and the Schools are in agreement on a specific programs. These funds are also designated for specific items as shown in the budget document. Use of significant amounts of funds in a manner other than as agreed, must therefore be strongly justified and must reflect urgent and unplanned changes in objectives or policies; or substantial unexpected changes in workload. Poor planning and/or mis-management are not sufficient basis for altering a plan agreed upon by the D.C. Government, the Congress and the School System.

(3) Authority for reprogramming and redirection

District of Columbia Budget Circular No. B-1, dated April 18, 1969 set forth the authority for reprogramming and redirection.

(4) Uses and Limitations

Reprogramming decisions can be made at the FLNT central administrative level unless it is considered significant. "Significant" as herein used is defined as (1) involving substantial amounts of money or (2) reflecting a major policy change. "Significant" reprogramming involves approval from the Board of Education. Internal FLNT reprogramming requires submission by the Administrative Coordinator to the Operational Team, and subsequently to the Special Projects Division for final approval.

In other cases, reprogramming can be approved for such items as realignment of clerical staffs, temporary staff assignment, special projects and other urgent matters caused by circumstances beyond the control of the program managers.

New permanent programs should not be developed and initiated from reprogrammed funds. Programs of a permanent, on-going nature, that are not included in the budget plan, should only be launched with redirected funds.

(5) Procedure for submission to D.C. Budget Office

The Director of Special Projects should complete Budget Form 1-69, Request for Reprogramming, to initiate a temporary shift of funds. Departmental savings must be identified and verified by accounting. Program changes must be justified. Approval, as outlined in item (6) below, must be secured by the initiating officer. Forms are then turned into the Budget Office. No action is to be taken before notification of approval is received from the Budget Office.

Redirection must be initiated by the Director of Special Projects. If the program being terminated or reduced is in another Division, approval by the affected Associate Superintendent must be obtained. Budget Form 2-69, Request for Redirection of Funds, is to be used for making such requests. The availability of funds must be verified by accounting before forms are forwarded to the Budget Office.

(6) Approving Authorities

a. Reprogramming that is not considered significant and involves less than $5,000.00 need only be approved by the Administrative Coordinator and the Director of Special Projects.

b. If the reprogramming is significant, the approval must be obtained from the Board of Education. D. C. Government approval and Congressional approval, if required, will be secured by the Budget Office.

c. All redirection must be approved by the Director of Special Projects. Board of Education, D. C. Government, and Congressional approval, if required, will be secured by the Budget Office.

REQUEST FOR REPROGRAMMING

DATE:

Division	Department

It is hereby requested that funds of this department be reprogrammed as indicated below:

Title of Program to receive funds ____________________

____

Amount of funds to be reprogrammed ____________________

Use of funds (number and type of personnel, amount of personnel cost, amount of supplies and equipment cost and other expenditures (identify).

(1)

(2)

(3)

(4)

(5)

(6)

Title of program providing funds: ____________________

____

Total program allotment ____________________

Balance in program after reprogramming ____________________

Accounting identification for source of funds used in reprogramming: (Activity code, program code and account code)

(1)

(2)

Accounting Verification ____________________
Signature and Title, Accounting Department

Justification for reprogramming (Include explanation of why funds are available in the source program along with reasons for need for funds in the receiving program).

(Use additional sheets if necessary)

Effective date of reprogramming ________________________

Reprogramming requested by ________________________
Signature

____
Title

Approved: ________________________
Signature and Title

Approved: ________________________
Signature and Title (Associate Superintendent)

Approved: D. C. Government, Congress ________________________
Title Budget Department

Budget Form 2-69

REQUEST FOR REDIRECTION OF FUNDS

DATE:

Division	Department

It is hereby requested that funds of ________________ department be redirected as indicated below:

Title of Program to receive funds: ________________

Amount of funds to be redirected ________________

Use of funds (number and type of personnel, amount of personnel cost, amount of supplies and equipment cost and other expenditures (identify).

(1)

(2)

(3)

(4)

(5)

(6)

Title of program providing funds: ________________

Total program allotment ________________

Balance, if any, in program after redirection ________________

Accounting identification for source of funds used in redirection: (Activity code, program code and account code)

(1)

(2)

Accounting Verification ________________
Signature and Title, Accounting Department

Justification for redirection (Include explanation of why source program is being terminated or cut back along with reasons for need for the new program and for funds requested in the new program).

(Use additional sheets if necessary)

Effective date for redirection______________________________

Redirection request by______________________________

Signature

Approved:______________________________

Source Division	Signature and Title	Director of Special Projects

Approved: D. C. Government, Congress

Title	Budget Office

3.12 Information System

3.12.1 The Need

An individualized instruction system, sensitive to each individual student and his parents, can place a formidable information processing burden on the school staff. No longer can the school deal with a class of individuals all studying at the same place in the same book in each subject. The school must plan for, monitor, instruct, and advise 700 individuals whose interests and preferences are constantly changing and whose learning requirements vary from subject to subject and from day to day. To perform these functions, school personnel must have information on a wide variety of matters: parental and student preferences, test scores measuring both achievement and interest in each subject, availability of curriculum materials suited to the specific needs of each student, etc. Since teachers and students must make many instructional decisions daily, the information must be available quickly and in a readily usable form.

To cope with this information problem, different approaches have been devised for individualized instruction schools. One common technique is to use teacher assistants or aides to collect instructional data on each student and prepare reports for use by teachers. In addition, assistants are sometimes given the task of correcting multiple choice tests as well as daily instructional work sheets. Still another approach is to compromise the inherent flexibility of individualized instruction by keeping the traditional classroom structure and the usual scheduling practices. For example, students are usually grouped by age into classrooms. The class might study mathematics every day from 9:00 a.m. to 10:00 a.m. Within such periods, each individual student may study at his own rate, but some rigidity is introduced since one student has to study mathematics for as long each day as another student -- even though the two differ in level of achievement and interest. With each of these methods, the resulting education environment leaves something to be desired. For example, the tasks of collecting and processing information take a considerable portion of the time of the teaching assistants. This not only represents a cost burden, it also precludes their participation in a more direct way in the instructional processes of the school.

To deal with such information overload, several innovative computer-based systems have been proposed and are in development. For example, Project PLAN, of the Westinghouse Learning Corporation, is a system that assists the teacher by correcting tests and workpapers for each student. The student marks with special pencil his answers to each test item. The computer reads the cards thus marked and prints out a score for the student, storing the data for future use. The computer also suggests (on the basis of his scores and background learning materials) what the student might study next. This latter function is particularly important for individualized instruction systems because it permits selection from a much wider set of curriculum materials. As the variety, modes, and media of individualized materials available to schools expand, teachers will be able to receive assistance in selecting materials.

Another innovative,computer-based project is that at the Oakleaf School near Pittsburgh, Pennsylvania. Under development at this school is a system for monitoring and prescribing for individual students, and for assisting teachers in planning their instruction and diagnosing individual learning difficulties. The information system proposed for the Fort Lincoln School is based upon this work.

Several features of the Education Plan proposed for the Fort Lincoln School make information processing even more critical than in the schools just mentioned. The most important of these is the free and unstructured environment. For example, a much greater emphasis is given to student and parental choice in the FLNT system than in the systems described above. Also, each student will come into contact with, be assisted by, be prescribed for, and be instructed by a team of teaching personnel rather than one or two teachers. To prevent working at cross purposes, teaching personnel must be provided with accurate, timely information on the students' present achievement and recent instructional history. An information system capable of fulfilling these requirements is described on the following pages.

3.12.2 Evolutionary Information System

It is proposed that the design, development, and implementation of a management information system for the Fort Lincoln First Facility be carried out in two phases:

- An initial phase in which all of the data collection, processing, and information retrieval will be performed manually by paraprofessional personnel and students under the direction of teachers;
- A second phase in which the manual system will be converted gradually over to one that is computer based.

Several reasons motivate this recommendation. During the initial phase, the school staff will be busy learning and adjusting to individualized instruction procedures as these are gradually introduced into the school program. During this time, manual information-handling procedures will give the staff greater confidence and establish a direct familarity with these procedures. Furthermore, during this introductory period, a manual system is adequate to handle the demands that are expected, and, in addition, will permit refinement of necessary forms, procedures, and reports. As the individualized program increases in complexity, the manual procedures can be replaced with computer-based data collection and reporting programs. When the full flexibility designed for the Fort Lincoln system is finally in place, a complete computer-based information system to support it will also be in place. However, implementation of computer procedures will not replace professional or paraprofessional staff. Instead, as the individualized program is implemented, greater use will be made of paraprofessionals for observation and direction of students, implementation of more flexible scheduling procedures, etc.

3.12.3 Information System Components

3.12.3.1 Introduction

The various elements of the information system can best be described in conjunction with the specific learning activities that make use of these system components.

Later, the procedures necessary to collect, maintain, and retrieve the required information will be described. Most of the discussion that follows will deal with the Phase I (manual) system. To lend specificity to the description, the discussion will describe how the information system will affect John Jones, a 12-year old pupil in Stage IV at the First Facility. In a traditional school, John would be in the sixth grade.

Figure 3-53 presents an overall description of the process to be described.

3.12.3.2 Placement

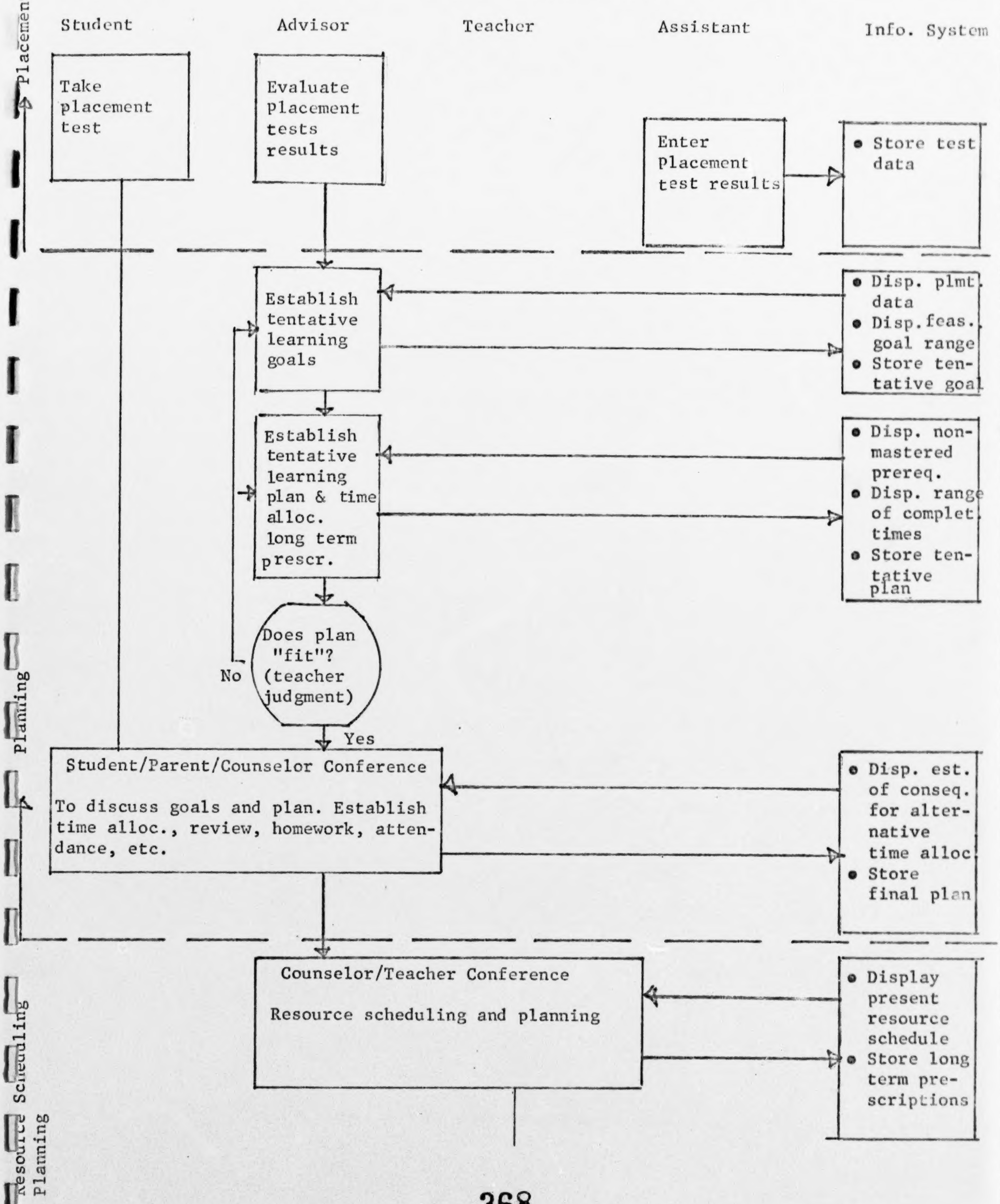
Upon registering in Fort Lincoln School, John is given an extensive series of tests covering health and physical development, academic achievement tests in each subject, and projective tests that help identify his interests. The results of these tests will serve as an initial basis for helping John, his parents, and his counselor plan his instruction.

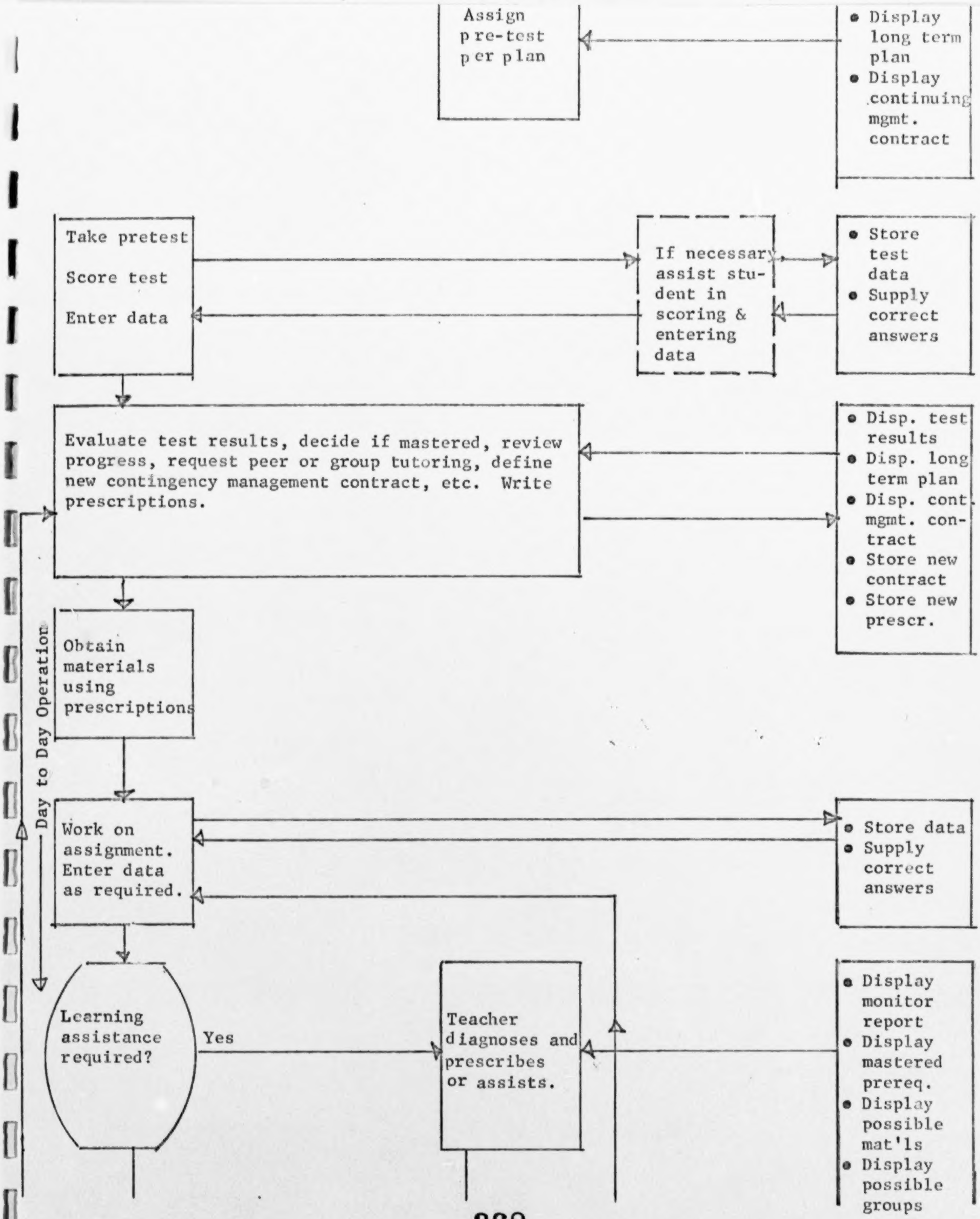
During this period, which may last one or two weeks, John is also "learning the ropes" in his new school. For this purpose, he is assigned to a fellow student who will accompany him, answer his questions, and serve as his guide. Also during this period, special descriptive material will be sent home to John's parents. This Parents' Handbook will outline the unique features of the school's instructional program and prepare the parents for the first major planning task that they will take part in: the Planning Conference.

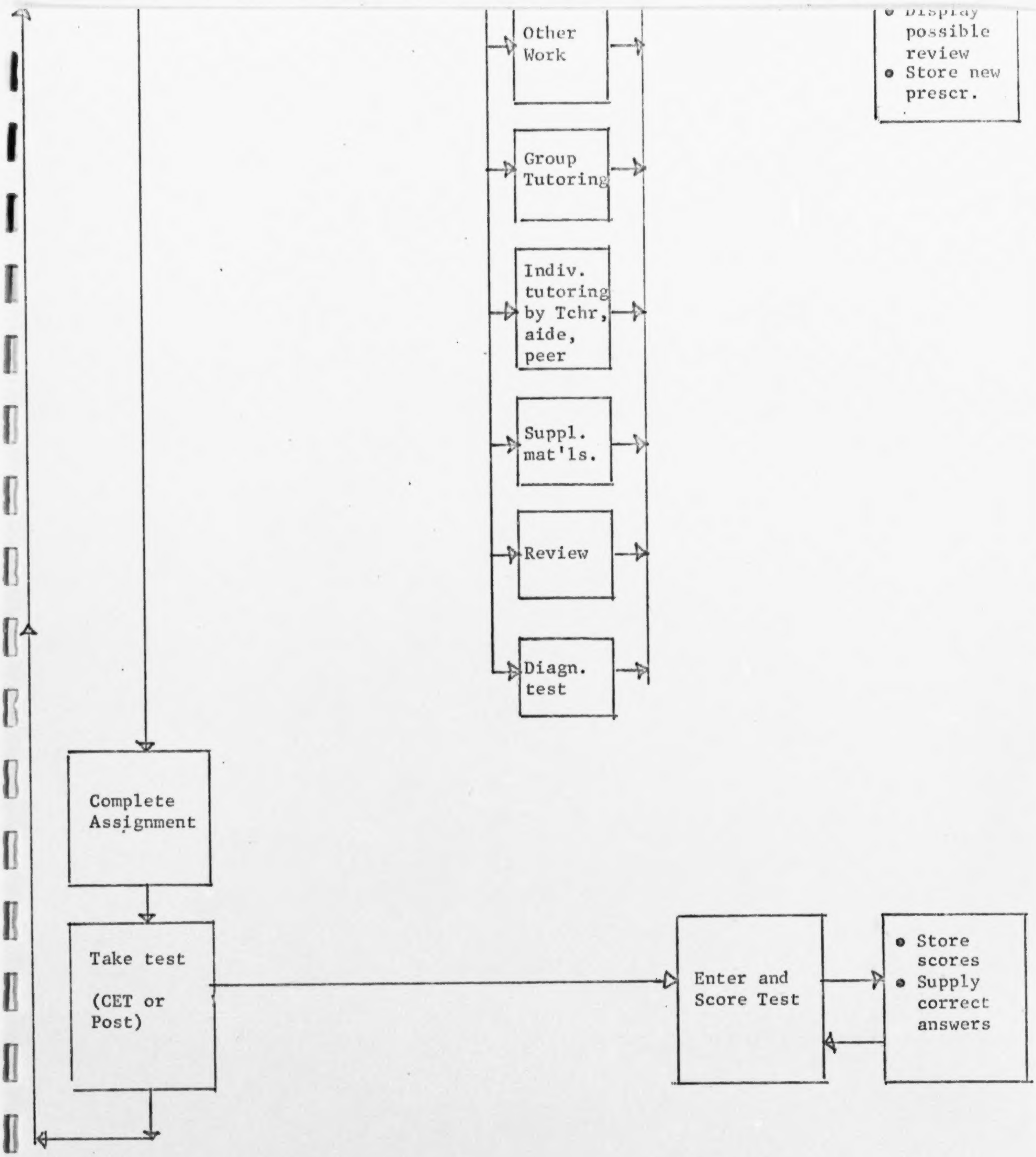
3.12.3.3 Planning Conference

The Planning Conference will take place sometime during the first one or two months after John is registered. Taking part are John, his parents, and his advisor. The advisor is one of the teachers in Stage IV. He will be responsible for helping John select and plan his instruction, monitoring his progress in all subjects and activities, and reporting to his parents periodically or on request. While other teachers will also instruct and assist John, his advisor will be the one to whom John's parents can look to be responsible for John's instruction.

Information System Flow


Student
Advisor
Teacher
Assistant
Info. System
Placement
Take placement test
Evaluate placement tests results
Enter Placement test results
• Store test data
Establish tentative learning goals
• Disp. plmt. data
• Disp. feas. goal range
• Store tentative goal
Establish tentative learning plan & time alloc. long term prescr.
• Disp. non-mastered prereq.
• Disp. range of complet. times
• Store tentative plan
Does plan "fit"? (teacher judgment)
No
Yes
Planning
Student/Parent/Counselor Conference
To discuss goals and plan. Establish time alloc., review, homework, attendance, etc.
• Disp. est. of conseq. for alternative time alloc.
• Store final plan
Counselor/Teacher Conference
Resource scheduling and planning
• Display present resource schedule
• Store long term prescriptions
Resource Scheduling Planning


Assign pre-test per plan
Display long term plan
Display continuing mgmt. contract
Take pretest
Score test
Enter data
If necessary, assist student in scoring & entering data
Store test data
Supply correct answers
Evaluate test results, decide if mastered, review progress, request peer or group tutoring, define new contingency management contract, etc. Write prescriptions.
Disp. test results
Disp. long term plan
Disp. cont. mgmt. contract
Store new contract
Store new prescr.
Day to Day Operation
Obtain materials using prescriptions
Work on assignment. Enter data as required.
Store data
Supply correct answers
Learning assistance required?
Yes
Teacher diagnoses and prescribes or assists.
Display monitor report
Display mastered prereq.
Display possible mat'ls
Display possible groups



• Display possible review
• Store new prescr.
Other Work
Group Tutoring
Indiv. tutoring by Tchr, aide, peer
Suppl. mat'ls.
Review
Diagn. test
Complete Assignment
Take test (CET or Post)
Enter and Score Test
• Store scores
• Supply correct answers

Figure 3-53

The initial Planning Conference is held to enable the development of a partnership between the school staff and John's parents. In this Conference, the parents can contribute their knowledge of John's aptitudes, interests, and habits of work. In addition, John and his parents can exercise some control over the instruction which he will receive over the coming weeks. The results of the Conference will enable the advisor to better plan for John's instruction and to marshal the school's resources to assist him. Future Planning Conferences will enable the same participants to review John's progress and to adjust John's schedule, learning plan, and available resources to his developing abilities, interests, etc.

To prepare for the Conference, the advisor will have available to him the results of the academic, projective, and health tests given John. He will establish a tentative learning goal in each subject for John to achieve over the next planning period. This period might cover only a few weeks or might extend over a few months. The advisor then charts tentatively how this goal might be achieved by specifying intermediate learning milestones necessary or recommended to achieve the specified goal. Figure 3-54 shows how the Learning Goal and Plan might look at this point. Note that for mathematics the counselor chose a planning period of three weeks while in reading he chose five weeks. Note also that the mathematics plan is very specific about what is to be studied in order to achieve the tentative goal, while in science the curriculum allows greater freedom. A tentative time allocation has been made by the counselor as well as suggested locations for John to study each subject and recommended tutoring or partner arrangements. All of these notations are subject to change depending on John and

Figure 3-54

Advisor Miss Franklin

Learning Goal and Plan
(Long-Term Prescription)

STUDENT John Jones

STAGE 4

DATE November 2, 1970

Time Alloc. Hrs/Week	Week #	10	11	12	13	14	15	16	Location	Partner or Tutor	Homework or Review
5	MATHEMATICS										
	Required Objectives	C-Mult.	C-Div.	C-Frac.					Math	No	Weekends Only
	Optional Objectives										
5	READING										
	Required Objectives	Sonnets		C-Vocab.		D- Para. Mean.			Lang. Arts	Miss Jones	No
	Optional Objectives										
5	SCIENCE										
	Required Objectives				Stars & Planets				Science	Bobby Smith	No
	Optional Objectives										
4	SOCIAL STUDIES										
	Required Objectives				The City				Lang. Arts	No	Review
	Optional Objectives										
	OTHER (______________)										
	Required Objectives										
	Optional Objectives										

TUTORING OF OTHERS ? Subject/Area. Math/B-Mult. Max. Time Per Week - 2 his parents' interests and desires as expressed in the subsequent Planning Conference. During the conference, John can select optional objectives which might involve special interests or projects. John and his parents can modify any part of the plan to increase emphasis on one area, to suggest homework or review assignments, etc. For example, John can specify for each subject who he wants to be tutored by, either a specific teacher or a specific student. John and his parents can specify whether he is to be given any homework and if so, how much and how frequently. Still another option will be the days that John is expected to be in attendance and the time of arrival and departure each day from school. (See Figure 3-56 and Section 3.12.3.5).

The above description of the Planning Conference must be modified to reflect differences between children in different stages. For children in Stage I, participation in the Planning Conference will be less explicit. However, participation should be encouraged in whatever way seems natural to the child.

After the initial Planning Conference, subsequent conferences can be held whenever one of the participants desires. Here the Learning Goals and Plan can be modified and progress reviewed any of the decisions or plans previously made can be changed.

The information system will be involved in two ways in the planning process outlined above. First, the information system will assist the advisor in preparing the Learning Goal and Plan. The system will supply the advisor with data on required or recommended sequences to achieve the selected goal; the system will provide time distributions based on other students' history for each of the intermediate milestones and determine an overall measure of difficulty given the time allocated and desired sequence. In addition, the information system will be involved in the implementation of the plan. The agreed-to plan will become part of the data in the information system. A copy of the plan will be kept in John's Permanent Folder (see below) to use for reference by John and his teachers. In addition, a duplicate of the schedule will be kept in John's stage folder for reference by him and the subject-area teacher.

A monitor report will be prepared as needed for the advisor showing progress by John on the specified plan for each subject. In this way, any learning difficulties can be spotted quickly and corrected or unusual gains rewarded. The Learning Goal and Plan jointly prepared with the parents and the weekly monitor report will thus be the basis of the school's "Report Card." This reporting of progress can take place at any time upon request by the parents or John as well as at the advisor's direction.

3.12.3.4 Resource Scheduling and Planning

Having established a Learning Goal and a Plan for achieving it in each subject, the advisor must marshal the resources of the school to assist John in achieving each goal. This means that personnel, facilities, equipment, and curriculum materials must be available for John to use. Since other students will also be demanding these resources, the demands must be reconciled and coordinated.

To allow this coordination of resources, the advisor and the staff of Stage IV will prepare an individual schedule for John. The schedule will cover one week (note that John may be in school on different days than other students and/or his hours of attendance may be different) and will normally be repeated every week until changed at the request of John, his parents, or his advisor. To assist the preparation of this individual schedule, the information system will maintain a detailed record of the schedule and resource demands for each student in Stage IV. In addition, the system will keep track of the availability and schedule for each facility and staff person. For example, the system will remember that certain parts of the school are unsupervised after certain hours. Similarly, the system will remember that a given teacher is available only during specified hours or on certain days.

The advisor will prepare a Schedule Request (see Figure 3-55) to reflect John's incremental demands upon the system. This request may be as detailed as the advisor chooses. He may choose to dictate specified times and locations for each day of the week that John attends (perhaps to permit interaction with himself or with specified teachers or students). Or, the advisor may merely request that the system take the already specified Learning Goal and Plan and prepare a tentative schedule to reflect its demands and coordinate them with the demands of other students. Note also that the advisor can specify a very free and unstructured schedule. For example, he can request that John be scheduled to study mathematics and language arts during the morning hours. John is then free to allocate the time himself depending upon his interests from day to day or the demands of the assignments he is working on. Upon receiving the completed schedule, the advisor may choose to accept it or resubmit it, establishing new constraints (perhaps fixing some schedule assignments, revising others, etc.). This process will continue until a satisfactory schedule has been prepared.

Figure 3-55

Schedule Request

Counselor Miss Franklin

STUDENT John Jones

STAGE IV

DATE November 9, 1970

Subject	Allocated Time	Location	Resource	Demand*	Schedule
DAY(S) Monday					
Mathematics	1	Math	—	—	
Reading	2	Lang. Arts	Miss Jones	S	9 - 11
			Audio Tape	O	
Social Studies	1	Lang. Arts	—	—	
DAY(S) Tues., Thurs.					
Mathematics	1	Math	—	—	
Science	1	Lab	Exper. Table	S	
			Mr. James	S	
			Audio	O	
DAY(S) Friday					
Social Studies	1	Lang. Arts	Computer Terminal	E	2 - 3

* Demand Code

O	Occasional use of the resource
E	Exclusive use of the resource
S	Shared use of the resource

The schedule will be printed out for filing in John's Stage Folder, and will guide him in his daily work. As he accomplishes the milestones which he and his parents and counselor planned, he will be aware of the need to revise time allocations, tutoring needs, and homework assignments in his next plan and schedule. It is this sense of control over his environment and learning, the insight and pleasure of planning, and subsequent mastery of challenging goals that the Fort Lincoln system is designed to provide for each student.

It should be noted in passing that the scheduling rules used by the information system in the above process will be different for different stages and will be made operational in different ways. For example, the schedules for individual students in Stage II must be simpler and more regular (repeating from day to day) than those for students in Stage III or IV. Similarly, most students in Stage I will not be capable of reading, let alone following, a printed schedule. Therefore, to make the process operational, the schedules will be printed for use by aides and older students in guiding and directing the children in Stage I.

Each individual schedule request will be placed upon an already existing total schedule and will thus "increment" that schedule. An individual request may thus cause other schedule changes, but generally these will be minor. For example, John's schedule request for tutoring by Bobby Smith in science will obviously require adjusting Bobby's schedule, but, in general, no one else's schedule will need to be adjusted. However, this incremental schedule adjustment process will periodically require a major restructuring to reflect changed demands as well as changes required by changed staff availability. Major restructuring of this kind will be performed by using modified school scheduling techniques as now incorporated in several computer programs.

3.12.3.5 Day-to-Day Operations

- General. Figure 3-53 describes the Day-to-Day Operations for each student in each stage. It should be noted that a student may be in different places in each subject in the process. For example, John Jones may be taking a pretest in mathematics during the time he is assigned in the mathematics area. Later in the day, when he is scheduled to be in the language arts area, he may be working on an assignment (perhaps a special project or a joint project with another student). Still later, when in the science area, he may be receiving special tutoring by an aide or a teacher.

  The manual information system will rely upon a set of folders and a set of procedures: to assign pretests, to prescribe learning activities for each student, to monitor each student's progress, to provide special assistance when required (supplementary materials, tutoring, review, homework, etc.), and finally to diagnose learning difficulties when they occur. In addition to these instructional practices, there will be a set of support procedures. The discussion of these procedures describes the system of folders that will make the manual system operational. Later, those changes that the computer-based system will make possible in Phase II will be described.

Three types of folders will be maintained for each student: A Permanent Folder retained by the student's advisor, a Stage Folder kept by the student, and one folder for each subject area. The Stage Folder will be carried by the student throughout the day. It will be deposited in the central resource center at the end of the day.

(Presence or absence of the folder will form the basis for daily attendance recording.) In the Stage Folder will be:

- A duplicate copy of the student's current Learning Goal and Plan
- His Expected Attendance (By day of the week and by time period -- See Figure 3-56)
- Complete Placement Test Scores
- Record of Behavior and Interest Information (Projective Test -- See Figure 3-57)
- A completed Schedule Request Form (See Figure 3-55)

Each Subject Folder will contain:

- Current Prescription and Test Score History (See Figure 3-58)
- Learning Goal and Plan (copy)
- Current worksheets, materials, instructions, etc. for that subject
- A copy of the Schedule Request Form.

Student subject folders will be kept in the subject area in the appropriate stage. Upon arriving at a given area, the student will get his folder and start working. Upon leaving the area, a student will return his folder to the subject area file. (Again, the presence or absence of the folder will signal the assistant of the student's presence or absence.)

All of the folders will be color coded by subject and stage to assist in ready retrieval. The color code will also assist the aide in maintaining cognizance over students in her area.

- Assignment and Evaluation of Pretest. This step in the process described in Figure 3-53 can be an important occasion for student choice and student interaction with a teacher. It can also be an opportunity for the teacher to reward and to motivate the student for new accomplishments and to present new challenges and opportunities. Thus it is important that maximum freedom be permitted in this process while at the same time assuring that the interaction occurs frequently. The interaction should aim at helping students gain a feeling of meeting successive challenges, mastering them, and perceiving increasing self-competence and increasing responsibility. The description below then, is to be read as but one sequence of many possibile sequences. In particular, it should not be read as if the roles described and the decisions made are to be fixed.

Figure 3-56

Counselor Miss Franklin

Expected Attendance Schedule

STUDENT John Jones STAGE IV DATE November 2, 1970

Arrival at School (circle one) 7:00 7:30 [✓ 8:00] 8:30 9:00 9:30 10:00 10:30 11:00

Departure from School (circle one) 1:00 1:30 [✓ 2:00] 2:30 3:00 3:30 4:00 4:30 5:00

Days at School (circle five) [✓ M] [✓ T] [✓ W] TH [✓ F] [✓ S]

Figure 3-57

Behavior and Interest Information

Name ______________________________ Age ______________________

Behavior	Formal Projective Test	Informal Projective Test
Tolerance		
Persistence in the Face of Frustration		
Acceptance of Criticism		
Ability to Relax		
Self-Confidence		
Attention Span		

Notes: ____

____

____

Interests:

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

______________________________ ______________________________

Note on Sample: The behavior categories are just examples. There will likely be more. The information filled in by the teacher will be coded by numbers or checked acceptable, nonacceptable as a means to alert the teacher to any problems that she might want to check in the cumulative folder of the student. Interests will consist of a sentence description of main interests per month.

Upon completing and mastery of a unit posttest, John will take his Stage Folder and Subject Folder to the teacher in charge of the subject area, (the posttest will have been scored by an aide). After reviewing his work, the teacher may ask John to look over the content of the next unit called for by his Learning Plan. This will be a specially prepared set of "overview" materials that describe the objectives of the unit, why the subject matter or skill is important or how it is used. The material will also describe the kinds of activities and tasks that will be involved in the unit and the options available. For example, some objectives can be achieved by work with paper-and-pencil learning materials, other objectives by playing a game or doing library research, others may require media of various kinds. The material will identify required and optional objectives. If John wishes, he can elect to study one or more objectives without taking a pretest. Or, if he thinks he knows some of the material already, he can choose to take a prettest. Still another option, is that John may take the overview material home so that his parents are informed of his progress and understand what he will be working on next.

If John decides to take the pretest, the test will be scored by him, and if the teacher so suggests, John can prescribe his work assignments for himself.

At the end of his process, two things have happened:

- John has begun a new assignment. A new prescription for that subject is in his subject area folder.
- John's counselor is informed at his next review of John's completion of another milestone and the selections he has made for his next assignment.

- Prescription. The procedures used for prescribing are the critical procedures in individualized instruction. Through this instrument, teachers guide and direct the learning activities of each student. Through the prescription, the school records and monitors the progress of each student and senses the choices he makes. It is in the prescription that the critical selection of appropriate learning materials is made. In summary, the prescription is the instrument through which the school's sense of purpose is communicated and the student's increasing competence is recorded and monitored. It is important then that comprehensive and easy-to-use procedures be designed to carry out this critical process.

Figure 3-58 presents a sample Prescription and Test Score Record. Blank forms will be stored in each subject area. After a student has elected to work in a unit or has taken a pretest that indicates work should be done in the given unit, the appropriate form is pulled an an initial

Figure 3-58

STUDENT ______________ STAGE ________ COUNSELOR ______________
Level: A Unit: Numeration
MATHEMATICS
PRESCRIPTION & TEST SCORE RECORD

Begin		
End		
Days Worked		

Unit Tests

		Pre 1	Pre 2	Post 1	Post 2	Post 3	Post 4
Score							
	%						
	Date						

	Worksheets							Curriculum Test						
	Date Pres.	Pres. Init.	Page No	Skill No.	Items	Score	Hi-Lo Crit.	Date	Sc's Init.	Part 1 Items	Part 1 %	Part 2 Items	Part 2 %	Sc's Init.
1														
2														
3														
4														
5														
6														
7														
8														
9														
10														
1														
12														
13														
4														
15														

Available Activities

ge No.	Publ.	Title	Location	Length	Prereq. Objs.	Remarks
1	Encyc Brit	Taller? Shorter? Larger? Smaller?	RC	4 frames		Arithmetic for Beginners Series I Filmstrip 6
2	CENCO	Count to Ten	RC			Book
3	Encyc Brit	How Many?	RC	[illegible] frames		Arithmetic for Beginners Series I Filmstrip 2
4	Sullivan	Readiness in Math	Math			Teacher Ed.
5	Encyc Brit	Recognizing Numbers	RC	[illegible] frames		Arithmetic for Beginners Series I Filmstrip 5
6	Sullivan	Readiness in Math	Math			Teacher Ed.
7	CENCO	Arithmetic for Beginners	Math			Counting Game
8	Wiley	Mathematics Begins	Math			Teacher Ed.
9	EFB	Fun With Sets	RC	15 min		Filmstrip
0	Sullivan	Readiness in Math	Math			Teacher Ed.
11	Hammett	Seat Work in Counting	Math			Numbers & Sets
12	Sullivan	Readiness in Math	Math			Teacher Ed.
3	Montessori	Counting Tray	Math			
14	CENCO	Number Concept Card	Math			
15	McGraw Hill	What is Four	RC			Film
6	Montessori	First Counting	Math			
17	Montessori	Counting & Numbers	Math			
18	SRA	The Red Book	Math			ages 5 & 6
9	Wiley	Mathematics Begins	Math			Teacher Ed.
20	CENCO	Arithmetic for Beginners	Math			Counting Game
21	Sullivan	Readiness in Math	Math			Teacher Ed.
2	[illegible]	Number Readiness Poster	Math			[illegible] Numbers

Numeration	T	Pgs	Pgs	Pgs	Pgs	Skill	Pts	Pre	%	Post	%	Post	%	Post	%	Post	%
						1	10										
						2	10										
						3	10										
						4	10										
						5	10										
						6	10										
						Total	60										
	T	4	3	2	1	%											
						Date											
						Time											

prescription is made. (Note that the prescriber could be the student, the subject-area teacher or the advisor.) The form carries pertinent information about the materials available to teach the given objectives. These materials can be prescribed exclusively or can supplement the IPI materials. (Note that IPI materials are not listed explicitly.)

The structure of prerequisite relationships (if any exist in the specific materials) are listed in the "Prereq. Objs." column. Thus a teacher or student will know that a given set of materials assumes the student to already have a set of skills and competencies. This information is listed for guidance only, since a student may choose to try the material anyway.

The reverse side of the form has a complete record of the student's scores in this unit as well as summary information for use by teachers.

- Monitor Report. The prescription process in the classroom is more than the assigning of materials, recording of scores and choices, etc. The teacher should be looking for potential problem areas, identifying exceptional performance, motivating and rewarding students, etc. To assist this process, the information system will provide each subject-area teacher a list of students who require special attention. The students on the list may require special rewards, e.g.

when contingency management techniques are being used; or a student on the list may have spent (for him) an unusual length of time in one unit; or the materials being used by a student may be particularly complex and require special explanation or direction; or several students may be working on the same or related areas and could thus profit from a group tutoring lesson from the teacher. These instructional opportunities will be identified as they occur and recorded in a Monitor Report for use by the teacher. (See Figure 3-59.)

Under the manual system, the Monitor Report will be prepared weekly by paraprofessional personnel in each stage and for each subject area. Under the computer-based system, the report will be prepared daily and will incorporate the previous day's activity (unit completions, number of days worked, new group possibilities, etc.).

3.12.3.6 Data Processing Operations

- Manual System. A considerable amount of data will have to be collected, reviewed, processed, and reported in order to provide an optimal learning environment. Using the manual system will require a significant portion of the time of available paraprofessional personnel. To reduce the workload to a level than can be accurately and reliably handled by the planned staff, several limitations will have to be observed:

Subject Mathematics

Teacher(s) Franklin, Jones

Period Tuesday, a.m.

Date November 9, 1970

Special Attention:

Student	Reason
Jones, John	C - Mult 7 days. Expected: 5 days.
Smith, Bobby	E - Fractions. Help with material.
James, Mary	Reward for each page.

Potential Groups:

Group	Names	Area	Possible Mat'ls
1	Jones, James, Harris	C - Mult.	Flash cards
2	Smith, Taylor, Upjohn	E - Frac.	E - Frac. film

Figure 3-59 Monitor Report

- Reports will generally be available only on a weekly basis. However, special requests may be processed for individual teachers or individual students.
- Scheduling of students will be constrained to highly regular patterns so that information needs can be anticipated, data collection and processing tasks assigned,and reports delivered to appropriate subject areas.
- Maximum use will be made of students and student helpers to score and correct work pages, administer tests to individual students,and record required data.
- Only the reports mentioned above will be available on a regular basis. As teacher gains experience with individualized instruction processes, they will conceive of additional reports to perform specialized functions. These additional requirements will be collected and implemented on the computer-based system.

Under the manual information system, tasks will be divided into those that should be performed in the subject area, while instruction is proceeding, and those that can be performed at the end of the day. The major data task is that of recording unit pretest and posttest scores after these have been obtained by the student or a Student Helper. These data are recorded on the back of the Prescription and Test Record sheet for immediate use by the teacher. During this recording process, the assistant will briefly check the work of the Student Helper.

At the end of the day, all Subject-Area folders that have had mastered posttests completed will be collected. Assistants will update the Learning Goal and Plan forms for the appropriate students. In addition, data will be pulled off for use in preparing the weekly Monitor Report.

- Computer-Based System. To overcome the limitations of the manual system, it is planned to incorporate all the storing, processing, and reporting functions in a computer-based system. This system will release paraprofessional personnel for observing, directing, and tutoring children while at the same time, providing more timely information. For example, completely flexible scheduling practices can be adopted and changed for individual students as their needs require. Monitor Reports will be available as required throughout the day rather than weekly. In addition, the computer-based system will provide the capability of supplementing the standard reports with special systems as these are required by teachers.

Implementation of the computer-based system can take place using one of three major alternatives:

- Provide the computer processing using the present District computer installation, modifying it as necessary to meet the Fort Lincoln requirements.

- Obtain the services from a commercial time-sharing service center.
- Install a very small computer in the Fort Lincoln School to provide immediate reports while communicating with a larger service center (either the District facility or a commercial center) for larger tasks.

No recommendation between these alternatives is being made in this report. A detailed review of the pros and cons of each alternative will be made in the December 1969 report for the First Facility.

3.12.4 Costs

3.12.4.1 Manual System

Paraprofessional personnel required to collect, retrieve, process, and report instructional information have been provided for in the Organization/Staffing Plan (Volume II, Section 2). Thus, no additiona information system costs need be incurred. However, it is estimated that 70% - 85% of the paraprofessional time will in fact be required for information system purposes.

3.12.4.2 Computer-Based System

No detailed estimate of costs for the computer-based system will be made until the December report. However, it is estimated that the above functions can be supplied for approximately $60.00 per student per year. Actual costs may vary from this nominal value depending on amortization schedules for purchased equipment, present costs, loading of the District computer facility, etc.

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4. COMMUNITY PARTICIPATION PLAN

4.1 Process and History of FLNT Community Participation

One of GLC's mandates for planning was to devise alternative community-based programs and recommend one of them for inclusion in the comprehensive education plan. The recommended community plan would indicate how the FLNT community might participate in the design, administration, and operations of the new school system. It was necessary for the D. C. Public Schools, the FLNT community, and GLC to develop cooperatively the detailed steps in the formulation of the plan. Subsequently, a plan was constructed which all parties considered to be both comprehensive in design and flexible in approach. This plan was described in the Definition Summary already submitted by GLC.

4.2 Community Educational Concern

The community participation plan deals with two levels of educational concern expressed by community residents. One level relates to the FLNT community's recommendations for governance and accountability of, and decision making for, the first educational facility, as well as the entire educational system. A second level deals with:

- Parent participation in the instructional process.
- Parents' orientation and handbook.
- Policies relating to parents' activities.
- Parents' role as community resources.

4.3 Process for Community Selection of Structural and Supplementary Program Activities

As described in the Definition Summary, the Special Projects Division of the D. C. Public Schools, the FLNT Citizens Advisory Council, the Council Education Committee, and GLC staff invited representatives of community organizations to attend workshop sessions. All these sessions were attended by FLNT area organization representatives on a voluntary basis. By the end of July they had developed recommendations for agency and community review.

Community participation alternatives were discussed in two different frameworks: structural and community education. Structural alternatives are the possible systems which could allow the FLNT community to participate in the governance and/or operations of the new school system. (These alternatives are discussed in Section 4.4.) Community education alternatives are the possible support programs which could be designed to expand the educational opportunities of all FLNT citizens as well as students. (See Section 4.6.)

To begin, the participants felt a strong antipathy for any structural alternative which was simply advisory. They felt no one would pay attention to an advisory body and that a group performing advisory functions would not be accountable to the FLNT community. These notions opened further discussion about the nature of community participation or shared power concepts and community control. After much discussion and explanation, the group decided that the community at large should decide which alternatives seemed appropriate. A decision was reached at this point by the group; it decided to construct an Interim Education Committee (I. E. C.) which would assume certain shared power responsibilities until such time as the community "elected" the most suitable aternative for continued participation.

This decision met several of the criteria established by the group:

- That the alternative chosen must meet all present and future needs of the new school system and its constituency.
- That an interim body should be recommended which would not preclude expanded participation by additional community organizations or desired flexibility.
- That the interim body should not interfere with the selection or election of a different body or council in the future.
- That the interim body would provide substantive leadership immediately and during the transition phase between I. E. C. operation and the operation of the selected option beginning in Fall 1970.
- That a second group of alternatives should be recommended by the workshop participants, and community education programs be designed to provide additional education activities or to act in support of regular school programs.

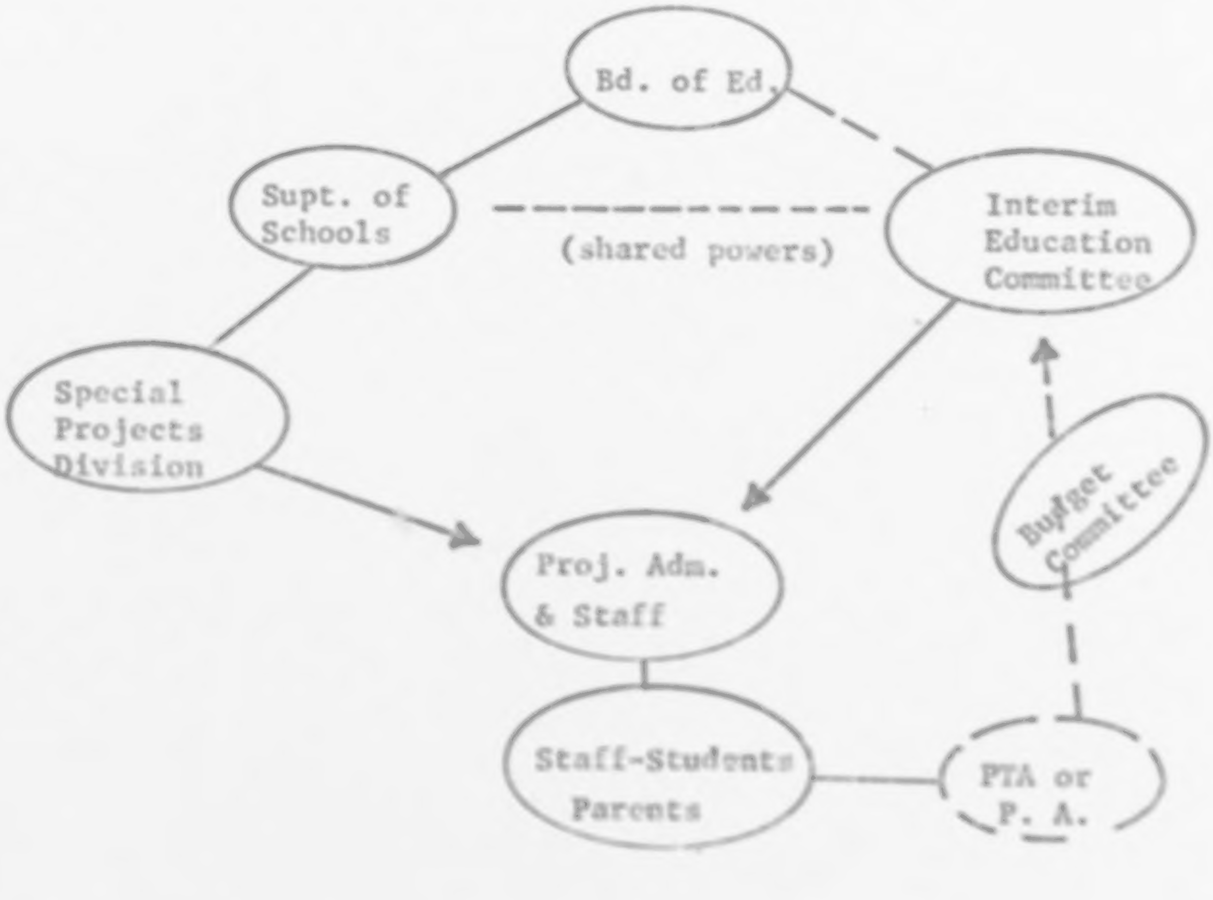
4.4 Community Participation Structural Alternatives Review

4.4.1 Recommended Interim Alternative

One alternative considered was the creation of a community board to serve as an advisory body to the Special Projects Division of the D. C. Schools. It would serve in this capacity during implementation and early operational phases, and its members would be selected by the FLNT Citizens Council. This alternative was rejected because of the fear that it would be a non-functioning, advisory body with no responsibility for planning, implementation, and operation of the first school facility.

The second alternative, accepted by the community group, was the creation of a group having "shared power" in the planning and implementation process — working with groups such as the Board of Education, Special Projects Division, and the project planning staff. (See Diagram below.) Called the Interim Education Committee (I. E. C.) it would be more than just advisory and could help establish the alternative selected to continue on a permanent basis after November 1970, electing the members and formalizing relationships.

The budget committee is also part of the machinery included as a subcommittee of the I. E. C., until such time as a permanent body is established. The PTA or PA could have a member or members and students could be represented.


Bd. of Ed.
Supt. of Schools
(shared powers)
Interim Education Committee
Special Projects Division
Budget Committee
Proj. Adm. & Staff
Staff-Students Parents
PTA or P. A.

The Interim Education Committee would be able to maintain continuity of planning, etc., without foreclosing future alternatives of a more permanent nature. It would work with the responsible school agency and with education consultants until December 31, 1970. This alternative is recommended for implementation in October 1969.

4.4.2 Permanent Participation Alternatives

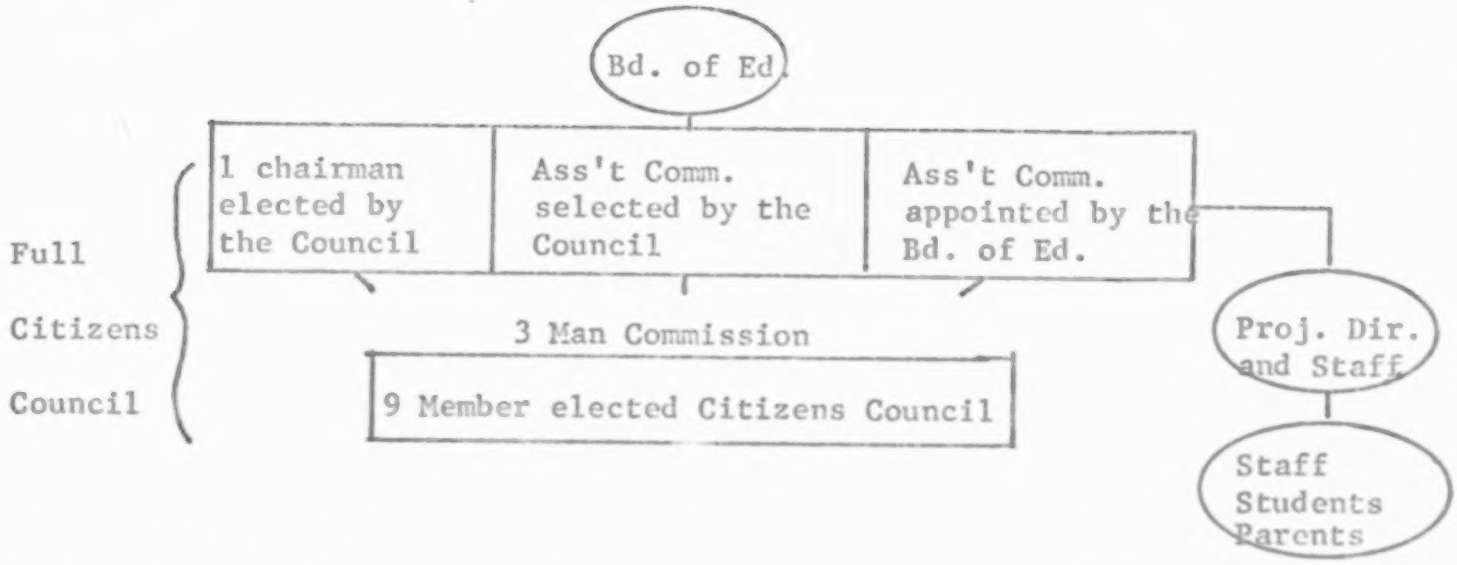
The I. E. C. will present two structural alternatives to the FLNT community as possible permanent systems to be established for community participation after the I. E. C. has fulfilled its role and function.

Before the First Facility becomes an existing entity, the FLNT community will be educated about the two feasible alternatives.

4.4.2.1 First Permanent Participation Alternative

This alternative deals with the election of a governing Citizens Council for the First Facility. This Council would be comprised of 12 citizens elected by all residents in the immediate FLNT area as well as on site. Elections would be held in both areas. The Honest Ballot Association or a similar agency would conduct the actual election.

Of the 12 members of the Council, 3 members would act as a "trioka" in implementing policy decisions arrived at by the full Council. One of three members would be elected by the Council to the post of Chairman of the "trioka" or Commission, one would be selected by the Council, and one would be appointed by the Board of Education. This Commission would relate the decisions of the Council to the Project Director and his staff for implementation. The following diagram sketches out, functionally, the roles of all parts of this Council.


Bd. of Ed.
1 chairman elected by the Council
Ass't Comm. selected by the Council
Ass't Comm. appointed by the Bd. of Ed.
Full Citizens Council
3 Man Commission
9 Member elected Citizens Council
Proj. Dir. and Staff
Staff
Students
Parents

Boundaries shall be Eastern Avenue, North Capitol Street and Florida Avenue, New York Avenue and the Arboretum Community. This shall be known as the affected area.

Membership

- Citizens Council:

  12 citizens elected by residents of the affected area as well as on site.

- 3-Man Commission (salaried positions):

  All are members of Citizens Council

  Chairman of Commission is elected by community at large.

  Assistant Chairman is selected by the Council.

  Assistant Commissioner is appointed by the Board of Education.

Qualifications of Council Members

- To be set by I. E. C.

Functions of Council

- To function along with the Board of Education in making policy decisions on Fort Lincoln School including personnel, administration, community participation, and curriculum materials.
- To negotiate contracts with the Board of Education and private agencies.
- To select the assistant commissioner for the 3-Man Commission.
- To regulate the activities of the 3-Man Commission.

Functions of 3-Man Commission

- To develop implementation plans for policies set by the Citizens Council.
- To act as liaison between Board of Education and Citizens Council.
- To regulate the activities of the Project Director and his staff.
- To relate the decisions of the Council to the Project Director and his staff for implementation.

Functions of Project Director

- To implement the plans set forth by the 3-Man Commission.

- To regulate school personnel.
- To be directly responsible to the 3-Man Commission.

Election of 12-Member Citizen's Council

Elections will be held in November 1970

The election will include the affected area and on-site residents.

Council shall be composed of 12 citizens.

4.4.2.2 Second Permanent Participation Alternative

A further expansion of the council or board idea would be a Board of Trustees which is an integral part of the school organization. Such a Board could be comprised of 10 to 16 members elected by the parents and residents of the community. They would not be salaried for obvious reasons.

The Board's functions would be:

- To relate community attitudes about the nature of the education the students recieve;
- To take joint responsibility with the administration for developing guidelines concerning future planning, policy of administration, special projects, and curriculum emphasis;
- To help coordinate parent-teacher-student relationship building by acting as resources to the school and as resource referral units.

Each member should recieve a per diem plus expenses in order to defray personal costs as much as possible.

Each member would be expected to spend one day a week in active participation in the school.

Membership of the board could be constructed in such a way as to represent a broad cross section of community opinion.

Graphically, the board could fit into the school operation as demonstrated in the following diagram.

A good operating model would be to utilize board members in teams of two or three. Each team so developed would then specialize in an area of personal interest and benefit to the school. For example — a team might aid the staff and administration in planning budgets, another team might act as a resource or as a resource referral unit.

Membership

- The Board of Trustees will be composed of the following people:

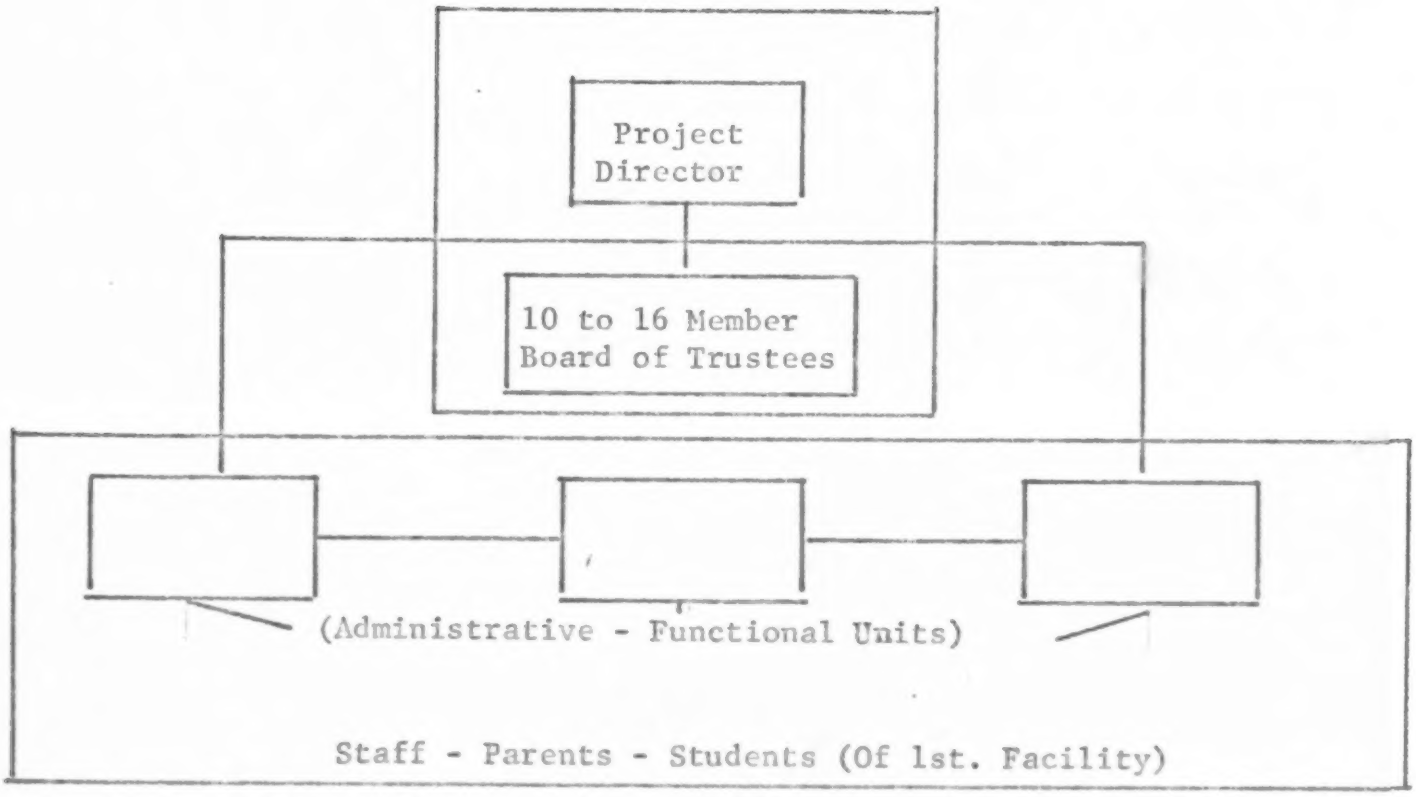
  3 students (aged 11 and over, 1 representative each from elementary school, junior high school, and senior high school)

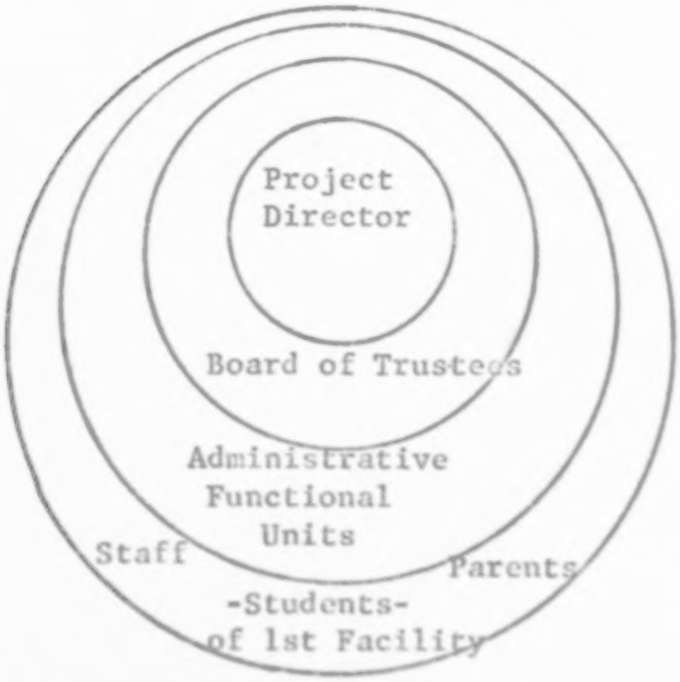
  2 senior citizens (over age 60 and residents on site)

  8 residents from the affected area (nonstudents over age 16).

  1 representative elected by D.C. Congress of Parents and Teachers

  Project Director FLNT.


Project Director
10 to 16 Member Board of Trustees
(Administrative - Functional Units)
Staff - Parents - Students (Of 1st. Facility)


Project Director
Board of Trustees
Administrative Functional Units
Staff
Parents
-Students-
of 1st Facility

Suggested Officers

- Officers will be elected by the Board of Trustees, majority rule.
- Officers, when needed will be Chairman, Vice-Chairman, Secretary, and Treasurer.
- The Project Director will not be eligible for Chairman of the Board.

Functions

- The Board of Trustees will assume all of the functions and responsibilities of the I. E. C.
- Additional functions will be considered as the Board operates.
- The Board of Trustees will develop a plan of transition by the time the second facility opens. (The intent of this function is to insure the opportunity for inclusion of on-site residents to sit on the Board of Trustees.)

Qualifications of Board Members

- Community representatives must be duly elected by majority rule by the residents of the affected area and on-site residents.
- Additional qualifications will be set by the I. E. C.

Election of Special Seats

- Student seats, senior citizen seats, and city-wide seats are special seats and will be filled as follows:
    - Students will elect their representatives from the affected area.

— Two staff members shall be elected, one of whom will be a teacher.

The specifics of the election process will be determined by the I. E. C.

4.4.3 Summary: Community Participation Alternatives

These alternatives just described indicate how the FLNT community can provide input into the school programs. They are best illustrated graphically as follows:

Alternatives	Type	Operational Time	Recommendations
I. E. C.	Shared Power	1 year	Recommended for adoption October 1969
Permanent	Fully Responsible Power	3 years	Recommended for discussion with the FLNT community in 1970 before elections and final adoption in December 1970
	Shared Power	3 years	

The Interim Education Committee operates until December 1970 when a new board is elected. I. E. C. will appoint 5 members to the new Board for one year beginning December 1970 to alleviate transition problems and provide continuity in planning.

4.4.4 Community Education Program Alternatives

Several alternatives were suggested for recommendation to the FLNT community in discussions, conferences, etc. They are the possible types of support programs FLNT citizens may wish to see operating in the First Facility. Some examples are: Learning Reinforcement Program; Reading Assistant Program; and Adult Education Program. (These alternatives are explained in Section 4.6.1.)

4.4.5 Timetable for Community Plan Activities

1969 Schedule by Weeks

Oct. 14	Special Projects Division conducts meeting to which 60 or so organizations will be invited to attend for the purpose of electing 20 or 25 persons to comprise the shared power Interim Education Committee (I. E. C.)
Oct. 14	I. E. C. meets and organizes.
Oct. 21	Special Projects with the assistance of the I. E. C. prepares information to be distributed to FLNT community concerning First Facility.
Oct. 28	Special Projects with the assistance of the I. E. C. distributes information to community and develops record-keeping mechanism.
Nov. 15	A copy of all information from Special Projects concerning number of staff, role descriptions, salary schedule, recruitment procedures, and recruitment constraints is forwarded to the Personnel Subcommittee of the I. E. C. along with prepared brochures to be used for advertising staff positions.
Nov. 29	Develops list of contacts.
Dec. 7	Community Cost Model will be reviewed by Administration Subcommittee of I. E. C. with Special Projects Division during program alternative selection. Community operating budget recommendations will be prepared for inclusion in the supplemental Budget to be submitted to Board of Education. An interviewing schedule prepared by Special Projects/Implementing Agent does not start until 1970 will be forwarded to the Personnel Subcommittee of the I. E. C.
1970	
Jan 2	Interviewing will be a joint effort of Personnel Subcommittee of I. E. C. and Special Projects/Implementing Agent.

June 7	Start up on Phase I Staff Development preparation: Follow-up on training site by I. E. C. and Implementing Agent.
June 12	I. E. C. should assist Implementing Agent in selecting programmatic and/or physical resources for use in Phase I Staff Development preparation.
June 17	Selection process of May 31 completed.
July 5	Begin to interface with Implementing Agent and training staff during Phase I Staff Development preparation.
July 19	I. E. C. prepares to distribute information to community concerning Board election.
July 26	I. E. C. disseminates information to the community.
Aug. 7	I. E. C. starts preparation for Board election.
Aug. 12	I. E. C. develops criteria for selection of prospective Board members.
Aug. 19	I. E. C. disseminates criteria for selection of Board members.
Sept. 7	I. E. C. distributes information concerning Board election and seeks petitions from prospective condidates.
Sept. 12	I. E. C. begins to support orientation and operation processes.
Sept. 19	I. E. C. continues to support orientation and operation processes. I. E. C. accepts petitions.
Sept. 26	Electoral process is submitted to Board of Education for approval.
Oct. 5	Candidates for Board are announced to community.
Oct. 12	Prospective Board members begin to campaign.
Jan. 8	Via Special Projects/Implementing Agent, Curriculum Subcommittee will review the following submitted lists (No approval required): • IPI and other materials • Resource Center • Parents' Manual • Equipment and Supplies for Training
Feb. 5	Interview will be completed for Core Training Staff and I. E. C. Personnel Subcommittee will submit their approval list to Implementing Agent.

Feb. 12	Prepared "Relocation Materials" will be forwarded to Personnel Subcommittee for their support of staff to be relocated.
March 1	Core staff hired.
March 15	Administration Subcommittee of the I. E. C. will be asked by Implementing Agent to lend support in determining school for training facility.
April 5	Staff recommendations approved and finalized by Personnel Subcommittee of I. E. C.
April 12	Personnel Subcommittee forwards recommendations to Special Projects Division and Board of Education.
April 19	First Facility students will be identified at this point and Implementing Agent will request support of Participation Subcommittee of I. E. C. in review session with parents of identified students (Parents' Manual).
May 3	Implementing Agent will begin work with I. E. C. in determining relocation process for staff to be relocated.
May 17	Implementing Agent may request support from Participation Subcommittee in selection of criteria (if not already established) for children who will participate in training program.
May 31	Selection process of community people to be locked into Phase I Staff Development preparation begun.
Nov. 5	Community election of Board members and type of Board takes place.
Nov. 12	Announcement of outcome of election disseminated.
Nov. 19	I. E. C. prepares for transition.
Dec. 5	Cost Model will be reviewed by Administrative Subcommittee of I. E. C. with FLNT administrators (Implementing Agent's job is finished) during selection of program alternatives. Budget recommendations for operating supplemental Budget will be prepared for submission to Board of Education.
Dec. 12	Installation of new officers.

4.5 Current Organization and Responsibilities of the Interim Education Committee

The Interim Education Committee, assisting the Special Projects Division of the D. C. Schools and the Board of Education, is essential to the continuity of planning the education program. It will be invaluable in the remainder of the planning phase, during the implementation phase, and up to the time the First Facility becomes operational. A number of important tasks will be undertaken during the implementation and early operational phases, including staff development (parents and paraprofessionals); recruitment of staff; training of staff: administration planning; and education program development.

Other considerations also apply. The Special Projects Division of the D. C. Schools will need the help of a group of people such as the proposed I. E. C. to provide the necessary community support and assistance during the next year. If a more permanent body were selected at this time, future options for community participation would be foreclosed. This would be especially disastrous as neither the present affected FLNT community nor future residents on the site will have been exposed or educated as to possibilities of a new education program.

This I. E. C. represents an attempt to maintain continuity of planning, implementation, and early operation without foreclosing alternatives for eventual meaningful community participation.

4.5.1 Duties and Responsibilities

Personnel Functions

- Encourage qualified people to apply for employment as staff members of the FLNT First Facility.

- Assist the contractor in recruitment, i.e., orient contractor to community feeling toward staff.
- Interview applicants and review qualifications, (not in terms of professional qualifications but rather human characteristics). (Note: Operating engineers should be licensed by D. C.)
- Assist contractor in providing human relations training for staff.
- Other functions as decided by the I. E. C. and Special Projects Division.

Until the final Board is elected, the Project Director will handle matters relating to release of staff members who can't or won't perform their functions.

Materials and Supplies

- Committee will review and react to materials and supplies suggested for the school by the contractor. Their recommendations will be the deciding factors in the materials and supplies ordered.

Parents, Students, and Community Participation

- Act as policy-making umbrella organization for community participation, by the authority of Special Projects Division and the D. C. Board of Education.
- Implementation of the community education programs as requested. (See Section 4. 6. 6.)

- Accept and act upon grievances from parents and students as referred by the Project Director.
- Set qualifications of candidates for the Board of Trustees or the Citizens Council, by the authority of the Special Projects Division.
- Election process to be specified by the I. E. C.

Budget

- I. E. C. will make recommendations to the Budget Committee on all items that appear in the FY budget.

Administration

- I. E. C. will work with Project Director to facilitate the smooth operation of the school by meeting with the Director as often as the I. E. C. and Project Director deem necessary.

Curriculum

- I. E. C. will work closely with the contractor on curriculum to review and recommend changes therein with the concurrence of the Special Projects Division.

Liaison

- I. E. C. will act as information disseminator between school and community.

Organization

- I. E. C. will operate these standing subcommittees:
  - Administration Subcommittee
  - Curriculum, Supplies, Materials, and Administration Subcommittee

- Personnel Subcommittee
- Participation Subcommittee (parent, student, and community participation.)

4.5.2 Membership

The I. E. C. membership as presently conceived will come from the original 60 major organizations invited to attend the Community Participation Planning Workshops. This group has been working under the auspices of the Special Projects Division of the District of Columbia Schools and represents a broad cross section of opinion. The Fort Lincoln Citizens Planning Council concurred in the selection of the various organizations invited to attend. Of the 60 organizations who attend the meeting to be held in October 1969, those who decide to participate will be assigned to subcommittees and become part of the I. E. C. Membership will include on-site residents should there be any before December 1970. Thereafter, on-site residents will automatically be included in whatever permanent body there may be.

A list of the members of the FLNT Community Planning Council may be found in Appendix G of the August 7 report, "Comprehensive Planning for an Education System."

4.5.3 Responsibility to the Community

One of the major ways for a community to participate in the educational process is to become thoroughly involved in community education programs in and surrounding the site of an educational facility. The programs to be outlined in Section 4.6 offer the FLNT community many opportunities for participation.

To enhance community participation, the I. E. C. will be asked to recommend community education programs to the Special Projects Division for funding directly out of the budget allocated to the first facility. The I. E. C.'s role, in addition, creates a common community interest in the educational affairs of the Fort Lincoln Schools. Through a monitoring process, the I. E. C. should be able to recommend people and other resources which can be utilized by the programs. Finally, the I. E. C. will work directly with the Project Director in developing guidelines for the operation of the community education programs when approved.

4.5.4 Responsibility to the School

The I. E. C., in representing FLNT community interests in the schools, has an obligation in terms of adding community attitudes and opinions to the operational mix in the planning, implementation, and evaluation of school programs. The I. E. C. will consist of standing subcommittees which will participate in several areas of school life.

- Administration Subcommittee. This committee will concern itself with the administrative policy in the school. For example, it will be expected to aid the Project Director in determining basic criteria in regard to lunchroom supervision or school-wide book distribution.
- Curriculum, Supplies, Materials, and Administration Subcommittee. This committee will concern itself with curriculum policies, use of supplies, and administrative policy with respect to curriculum.

- Personnel Subcommittee. This committee will concern itself with recruitment, setting of guidelines for hiring, and promoting a harmonious staff-community relationship.
- Participation Subcommittee. This committee will concern itself with assisting the Project Director in setting participation guidelines for parents, students, and community.

Future responsibilities for the I. E. C. involve the dissemination of information regarding its activities in the planning and operational phases until such time as a new Board is elected in December 1970.

4.5.5 Administration/Community Liaison

4.5.5.1 Structure of Reporting Committee

The Interim Education Committee or the elected Board for the Fort Lincoln schools will be operating as a group of standing committees and in this capacity will require permanent liaison to the school administration and staff. One of the most reasonable arrangements would be for a person representing the school to be assigned to each subcommittee to act as a liaison person somewhat in the manner of an executive secretary assigned as a permanent liaison person. The liaison person should either be a teacher or a coordinator and would perform in the following roles:

- Act as formal liaison between I.E.C. and the school administration and staff.
- Intrepret reports and data for the I. E. C.
- Attend all subcommittee meetings, but not vote.
- Arrange for all meetings and facilities for meetings.

- Duplicate and distribute all reports generated by the Operating Team to I. E. C. (See Volume 2, Section 2, Organization/Staffing Plan.)
- Report to the administration of the school on activities of the subcommittee.

In general, these functions would be performed as part of a staff member's normal duties and would require no additional personnel to be added to staff. Assuming that new duties may be identified and acquired by the liaison person, redefinition of responsibilities could be undertaken after the school becomes operational.

4.5.5.2 General Reports

The I. E. C. and the permanent community participation structure will make progress reports to the Fort Lincoln school or schools on February 1 and June 1 of the calendar year.

Progress reports from the executive secretaries on their activities will be made on the same dates of the calendar year.

Executive secretaries and the I. E. C. will determine which reports need to be presented.

4.5.6 Staff/Community Participation

The staff of the First Facility will be comprised of many people with special skills who must interact positively with parents, students, and other citizens of the FLNT area. After an appropriate period of orientation and Phase I Staff Development, the facility will open to the public. Programs will start and certain expectations of the FLNT community will be fulfilled. Before discussing these expectations, it would be well to indicate the numbers and basic responsibilities of this staff. (See Volume II, Section 2 for details.) These are:

- 37 professional and paraprofessional people.

  This includes teachers, administrators, aides, secretarial and support people, coordinators, community volunteers, etc.

- The staff will be concerned with:
  - Orientation of staff to operating system of facility
  - Obtaining resources such as food, materials, people, etc.
  - Production of materials
  - Payroll
  - Accounting
  - Transportation
  - Maintenance/repair
  - Record keeping
  - Purchasing
  - Security
  - Public relations/visitor accommodation.

  It will also be involved in:
  - Identifying needs for staff development
  - Problem solving -- individual student problems, stage-wide problems.
  - Supervising/assisting
  - Referral/follow-up -- special services

- Defining good instructional practices
- Allocating resources (schedule) -- time, things, people
- Designing and specifying materials.

In order to develop the positive interaction necessary for the smooth, efficient operation of the school, the FLNT community must be thoroughly involved. Several concerns of the FLNT community had been mentioned in the workshops. They are:

- Parent-teacher contacts must be increased so as to provide feedback of vital information between the community and the school.
- Community needs must be included in any staff development process.
- School pride on the part of students and parents must be developed so as to secure a proper environment for learning.
- The staff development phases should include the utilization of school aides and volunteers. Race relations and intrapersonal relations training should also be included.

As planned, paraprofessionals will be included on the staff and therefore will be able to impart the community viewpoint necessary for adequate school programming.

Teachers will be able to interact with parents through the conference setting. They will also be a part of the review committee. A permanent liaison person between the local Interim Education Committee or an elected Board and the school administration in the future in included in the Operations Plan, Volume II, Section 3. Further possibilities for staff/community communication and feedback will exist when the operational phase begins and more is known about the immediate needs of all persons concerned.

As outlined in 4.5.5.1, a reporting committee will be structured so as to provide constant information to the administration of the school and the D. C. Public School administration as to meetings, activities, reports, and interaction of the I.E.C. and P.T.A. An executive secretary will be assigned to work with this group.

The custodial engineer's staff and the dietitians' staff would be able to meet with other staff and with the I.E.C. on some regular basis so that community opinion is made known. Also an opportunity would exist for the first time for support staff to make their needs known to the community. Mutually agreed-upon goals can be set for the support services of the school that will enhance the environment for learning.

It is assumed that school volunteers will be carrying out many tasks during school hours and an excellent opportunity will exist to thoroughly include FLNT residents in the operation of the school through clothing drives, trip supervision, book distribution, etc. This kind of activity is often unheard of and not publicized. Often, even staff has not been aware of the volunteer's important functions. By including the volunteers in meetings and conferences a further bond is built between the community and the school.

These approaches should be viewed as vital links between people and institutions. Without these links an institution develops in isolation and grows unresponsive to the needs of the community it serves.

4.6 Community Education Programs

4.6.1 Programs Considered

Several support programs were suggested by the workshop participants for the purpose of supporting the regular school program in the Fort Lincoln First Facility as well as providing educational programs for students and adults in the FLNT area.

- Learning Reinforcement Program. A learning reinforcement program could be initiated in students' homes. With individualized approaches that deal with learning in new ways, it would seem necessary that parents be helped to understand how they can help their children. A master teacher selected by the principal and the governing parent body would supervise and train nine community residents (also chosen jointly) to educate parents in the new cognitive approaches. The community residents would visit the homes of all the students in the school before the academic year ends. The objectives of this program are:
  - To build a bridge of understanding about the education program between the community and the school.
  - To provide a source of feedback to the staff.
  - To encourage parents to participate in school programs as volunteers.
  - To provide a resource of people for leadership in the FLNT community.

  This program would operate out of the joint school-community facility. It is estimated that the appropriate ratio would be 70 student families allotted to each community instruction aide. Separate training would be provided through the school budget prior to the beginning of school. Parents would be encouraged to use instructional materials in their homes with their children. These materials will educate parents in the new methodology being used in the school.

- Reading Assistant Program. A basic program utilizing paraprofessional FLNT residents on the basis of one aide to two teachers would be designed to assist teachers in classroom instruction. The Anacostia Community Reading Program is an excellent model. Four weeks of training with additional in-service training is mandatory. The director of the program should be a community based professional who is part of the instructional staff. Preservice training would be provided. This program would also fill staff instructional needs in the facility.
- Adult Education Program. Adult Education would be another option that fulfills the function of community education. Curricula offerings would be based upon the needs and desires of community residents. However, suggested offerings include: Black Studies, Employment Education, Voter Registration, Creative Arts, and Technical Preparatory Training. One director and five part-time teachers or experienced community residents should be sufficient. The program would operate initially two

nights a week and would serve approximately 200 adults per week. Adults could "pay" their tuition in this program by tutoring students. Adult use of the school would be enhanced considerably, and they would act as models for students. This program also would provide additional resource people for community-school service.

- Tutorial Program. A tutorial model could be explored. The concept of students tutoring students is a proven success in New York City and could well be visualized in the Fort Lincoln School. One teacher, two aides, and 50 of the oldest, most responsible student tutors would operate between specified hours every day. For example, one set of tutors could be utilized in the mornings, another in the afternoons or evenings. Tutors would work with younger students who are finding difficulty in their regular school work. The supervising teacher should have considerable experience in all levels of curricula so as to enable the tutors to function effectively. A shared portion of the school-community facility could be utilized thus emphasizing the continuity of student to adult development. Any student who desires help would be able to find it here.
- Fund-raising Program. An easily overlooked function of an education system is the increased cost of present services in relation to future costs. An administrator should not have to

devote all of his time to trying to get special programs funded by private sources. For example, administrators are continually looking for ways to beef up or support programs within the school which are centered around reinforcing student's motivations to succeed. Programs like Higher Horizons in New York City were funded through the system channels, but other New York City schools needed the program and could not meet the stringent requirements set by the Board of Education. The suggestion here is to hire a part-time public relations person who has community experience to take over this function. It is also suggested that two days a week would be ample. The benefits that would accrue to the Fort Lincoln education system obviously would outweigh the cost of such a person.

- Student Teacher Program. A student teacher transitional program might be feasible as an aid to the staff in the operations phase. This unit would concern itself with orienting all people on or around the site who come into contact with citizens who have children in the school. Most universities have student teachers who could participate. This process also provides an additional source of future personnel who are well versed in the operations and methods of the school. At first glance the approach would seem to be a pure school function, but the suggestion here is that community resident volunteers who function in other capacities in the school be involved in the preservice and in-service training of the university students. Hopefully, the student-teacher community mix would alleviate some of the tensions now existing between teachers and parents. This unit would consist of 15 to 25 student teachers guided and supervised by an experienced teacher. The unit would operate from July 1970 to July 1971 and would aid in managing implementation/ operation problems. The minimum time for participation of student teachers in the program is one consecutive school year.

- Community Services. A further consideration should be recurring services provided within the school which would bring people into the facility. This option would be a modification of the Community Education Center model. A check cashing service, a health clinic, and/or a dental clinic could be included in the package of services provided. Since the services would be offered by public and private agencies, costs would present no problems. The I. E. C. and the school administration will decide which services should be provided.
- Satellite Learning Center Program. Satellite Learning Centers are further options worthy of consideration. For example, apartments could be rented by the school in houses or in commercial settings. The purpose of these Centers would be to:

- make the school visible in the community
- provide access to pertinent learning materials
- create a better linkage with residents and their children, some of whom may be preschoolers
- meet contingency education needs on the part of all resident students; but the primary purpose would not be to offer courses per se, but to simply provide additional learning environments for students closer to home. Homework or special projects could be undertaken in these Centers and would further support the student's motivation to learn and succeed. Adults or children would be able to use this space as a quiet, informative place apart from their busy schedules during the day.

A community person would supervise the Center and school staff could be on hand occasionally.

4.6.2 Information About Child Care

There are two kinds of federally supported programs for day care services for disadvantaged children under age 3: family day care homes and parent-child centers.

- Family day care home. Serves only as many children as it can integrate into its own physical setting and pattern of living. It may serve no more than five children when the age range is 0 through 6, including the family day care mother's own children. Only 2 of the 5 children can be under age 2.

  For this type of child care, Federal Interagency Day Care requirements must be met. Funding can be applied for under Title IV A and B of the Social Security Act (1967 amendments). Other Federal funding sources exist, but only money obtained through HEW under Title IV would be available.

  Federal Interagency Requirements have not been set for center care of children under 3 years of age. If programs offer center care for this age span, local licensing regulations and requirements must be met.

- Parent-child center. These programs serve disadvantaged children aged 0-3 years and their parents. The center has a comprehensive program of educational, social, and health services. OEO has funded some 20 demonstration parent-child centers (one in D. C.). More are planned, but a second in D. C. is unlikely.

In terms of the child's cognitive development, the parent-child center concept is superior to the family day care home, but the cost is prohibitive. Because guidelines for parent-child centers are still evolving, current demonstration projects operate under rigid health-sanitation rules which require elaborate facilities that approach a mini-children's hospital. The number of staff is based on an almost one to one ratio of adult to child.

4.6.3 Child Care in FLNT

Child care in FLNT should be planned within the context of the new 4C program (Community Coordinated Child Care). The District of Columbia is making progress as a 4C pilot program area and could serve as the contracting agency with HEW for a three-to-one matching grant under Title IV of the Social Security Act.

An alternative approach to the parent-child center might be a day care facility for 100-200 children between the ages of 3-5 with a full staff capable of assisting a network of family day care homes caring for children under age 3.

If private sources can provide 25 percent of the cost of such an operation, Title IV funds can be arranged for the balance (75 percent). Operationally, the private funds are given as a grant to the D. C. Welfare Department to serve 4C needs in FLNT. The Welfare Department arranges for the 75 percent matching grant from HEW and contracts through 4C for day care services in FLNT.

4.6.4 Community Education Programs Recommended

All the alternatives just outlined are suggested for recommendation to the FLNT community in discussions, conferences, etc. They are the possible types of support programs FLNT citizens may wish to see operating in the First Facility. The programs will necessarily need to be approved by the I. E. C. and Special Projects Division.

4.6.5 Implementation of Recommended Programs

A shared power Interim Education Committee will be selected by the 60 organizations originally invited to participate in the Community Participation Planning Workshops and any other additional groups missing from the list. This group broadly represents the existing FLNT community. It is expected that some 20 to 25 persons will be elected by the larger group to comprise the I. E. C. The I. E. C. will then be established and approved by the Board of Education. It will operate until December 1970 when the permanent governing board or council is selected through an area-wide election process. A meeting will be held in October 1969 to which the 60 or so organizations will be invited to attend.

The I. E. C. will have responsibility for carrying out several activities.

- The first major assignment of the interim committee will be to review the education program alternatives and to decide which of these should be included in the first year of the school. These final decisions must be made by the end of December 1969.
- The second major function is to disseminate information about the committee's work to the community.
- The third major function is to consider child-care services.
- The fourth major function will be add new members as new residents move to the site.

In the final stage of the I. E. C. 's existence, it will be responsible for disseminating information, announcing candidates for election to the new board, and assisting in the election process to be supervised by a responsible neutral body.

The I. E. C. will be funded through the earmarked community planning funds. The I. E. C. will also administer the community programs through a director/coordinator provided by the funds allotted.

In addition, the I. E. C. will be responsible and accountable to the Special Projects Division of the D. C. Board of Education.

4.6.6 Community Participation/Parent Involvement

As developed in the Education Plan, parent involvement will be a major key to the success of the new Fort Lincoln School system. Contrasted to a community-wide participation in the governance of the schools, involvement of parents should be an education-oriented process.

- Parents' role in the instructional program. Parents of children in the Fort Lincoln School may play a number of roles. As members of the community they may be consumers of adult education courses and/or use recreation facilities; they may be resource persons providing special skills, materials, or manpower; they will be decision-makers indirectly through their representatives on school councils and directly as parents of individual children. The total program for effective parental participation is discussed in the Education Plan, Volume I, Section 1.9, in terms of: orientation, Parents' Manual, and parental involvement.

- Parents' Role/Community Resources. There will be a definite need for the school to identify resources for utilization. These resources will be both people and programs. By programs is meant those churches, government agencies, local volunteer civic organizations, etc., which can fill the programmatic needs of the Fort Lincoln Schools and the community.

It would seem reasonable to assume that the Community Coordinator will be working with volunteers, parents, the I.E.C., and P.T.A. in locating resources. This work may be accomplished through the use of committees, telephone contacts, utilization of the parents' manual, conducting searches for materials and supplies, and obtaining leads to untapped personnel resources in the community. As an example of this kind of activity,the parents and the Community Coordinator will be conducting searches for old electronic equipment to outfit a science project and to locate personnel needed to operate that equipment if it is highly specialized. Further, parents make excellent suggestions regarding school needs that staff often overlook because they are too close to the situation.

4.7 Summary

With great effort and personal sacrifice during a vacation period, the workshop participants developed and recommended a community participation plan for Fort Lincoln Schools. It is felt that the plan is reasonable and flexible, accommodating future changes; that it will bridge the gaps between the planning, implementation, and operating phases; that it does not preclude any group from participating in the schools; and that it is designed to phase itself out at a specific time. It is also felt very strongly that the selected program would best protect the rights and interests of all FLNT residents both on and off site.

Both the structural and community education alternatives must be reviewed by the FLNT community at large before final selection of the structure itself and the election of people to the new Board.

A process has been outlined for the staff of the new Fort Lincoln Schools which will enhance its interaction with the community in a very real way.

Administrative inputs have been recommended that hopefully will bring the community closer to the operations of the schools.